ENHANCEMENT AND INTEGRATION OF ORG MONITOR APP WITH SALESFORCE

Introduction:

Org Monitor App for Salesforce is a tool for monitoring security data, health risk for multiple connected salesforce production orgs and sandbox orgs.

This package is used to gather the stats necessary to evaluate the basic security posture of a wide portfolio of Salesforce Orgs.

This package imparts information like how many users, profiles, permission sets, roles, apex classes, VF pages, apex triggers, Remote Site Settings, Objects, API usage in the org.

This tool monitors the Security Health data of multiple orgs and at the same time the users can interact with UI and perform operations like connect, refresh, sort and delete org data.

PROBLEMS:

- The client was having an outdated package of org monitor tool which was not in working state. The several components of the package were outdated and were inoperative.

- Multiple queries in the package were not working.

- Requirement was to make the User Interface user friendly and to revamp the user interface.

- The client wanted to use OAuth 2.0 for authorisation/connecting of orgs.

- The client wanted to add the button for adding and refreshing the orgs on the home page. And all the connected orgs should be displayed on the home page.

- The client also wanted to be able to sort the connected orgs based upon the health score of the orgs.

- The databases incorporated in the package were of older versions and need to implement latest versions of databases.

- Requirement was to remove the dependencies on two databases.

- The client wanted to make the package as an executable file.

Solutions:

We provided a custom solution and made the app more refined with new features and functionalities. As a part of the solution, we accomplished the following:

1. Reconfigure the package -

Successfully completed the configuration after finding the bugs as the available code was 4 years old and there were several components of the package that were outdated and were inoperative.

2. Implemented queries to fetch the data -

Implemented SOQL queries against all connected Orgs to fetch the required data to provide the visibility of users with high-level privileges (VAD, MAD, Author Apex, etc), and surfaces Health Check score and risks - all from a central location.

3. Revamped User Interface -

We have revamped the UI of the app to display the required information in a centralised manner using ReactJS. Earlier HTML and JS was used from server-side rendering for UI.

4. Implemented OAuth 2.0 -

Implemented the OAuth 2.0 for authorising and connecting salesforce org to our org monitor tool.

5. Added Buttons on Home Page -

Three buttons named Connect, Sandbox and Refresh All Orgs added to UI for connecting the salesforce production org, salesforce sandbox org and fetch latest data for all connected orgs.
After every one hour the app automatically fetches the latest data of salesforce orgs. Also provided the functionality of sorting the org data with different parameters on home page and Rank page.
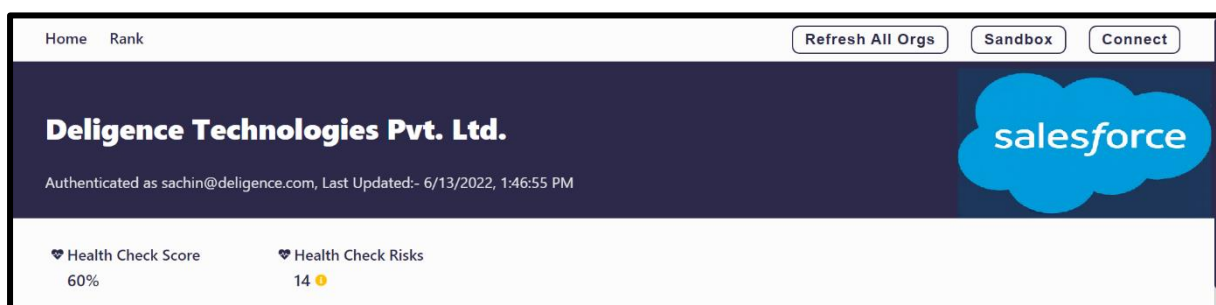
6. Integrated latest versions of Database -

We have integrated with the latest version of MongoDB 5.0 and PostgreSQL 13.7, the earlier versions were MongoDB 4.0 and PostgreSQL 11.16.

7. Removed the dependencies on two databases -

We have integrated with the latest version of SQLite 3 database and also removed

the dependencies on Postgres and MongoDB databases.

8. Converted package into Executable file -

Build the app into an .exe file so users only run the app to use and no need to set up a database by users. App automatically sets up a SQLite database into the user's system.

9. Technologies Used -

MongoDB, PostgreSQL, SQLite, OAuth2.0, Salesforce API, Node.JS, React.JS