System Admin Toolkit

User Access & Permissions
Email Templates & Email Automation
Resulting Appointments & Rehashing
List Views & Filter Criteria
Reports – making quick modifications
System Accountability

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Agenda

User Access & Permissions

- ❑ Users Profile vs Permission Set – what is the difference?
- ❑ Role Hierarchy – why might we use Roles?

Email Templates & Automations

- ❑ Setup > Flows > Check which Email Flows are Active
- ❑ App Launcher > Email Templates > How to Edit Email Templates

Resulting Appointments & Rehashing

- ❑ All Appointments need a Result for Reporting
- ❑ Where to Result Appointments
- ❑ Where to find Rehash Opportunities

List Views & Filter Conditions

- ❑ Who can create List Views?
- ❑ List Views can be created on every Object Tab to organize records
- ❑ Understanding Filter Conditions

Out-of-the-Box Reports

- ❑ 15 Reports pre-built
- ❑ How to Edit Date Range, Groupings, Sort Order, and Share Reports

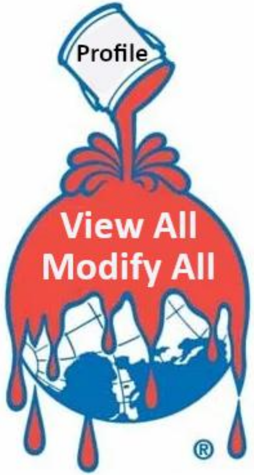
System Accountability

- ❑ Set Field History Tracking
- ❑ Set Field Level Security

User Profile and Permission Sets

Profile is the base set of permissions for the User. [OOB Profiles & Permissions]
Permission Sets can only add functionality and features; they do not take away.

Profile Permission Set Permission Set



	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Sales Appointments	☑	☑	☑	☐	☐	☐	☐

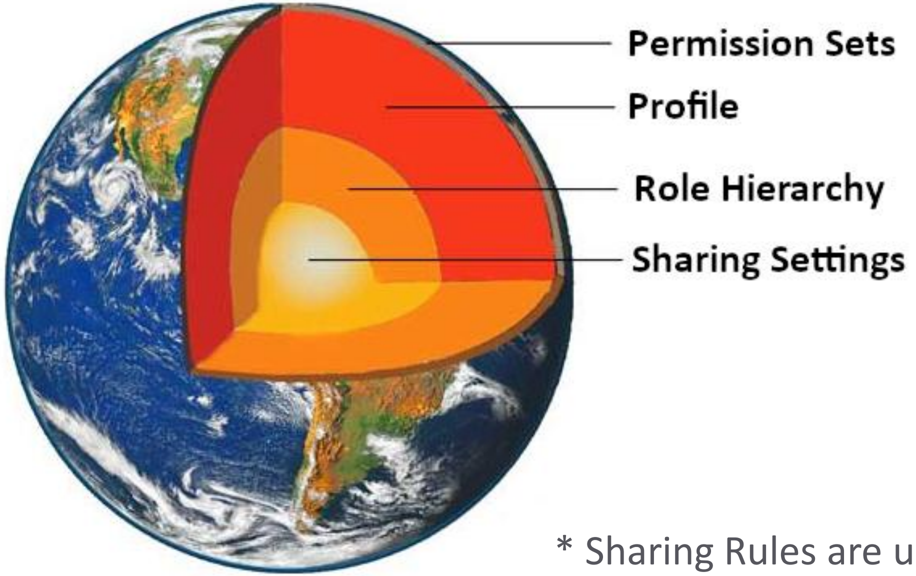
View All or Modify All on either Profile OR Permission Set will override the Org-wide Sharing Settings, allowing the User to see records not expressly shared with them.

ADMINISTRATION

- Users
  - Analytics Groups
  - Permission Set Groups
  - Permission Sets
  - Profiles
  - Public Groups
  - Queues
  - Roles
  - User Management Settings
  - Users

User Permissions

User Permissions are layered, like onions, parfaits, or the earth.



Troubleshooting Order:
Start from the core and work outward!

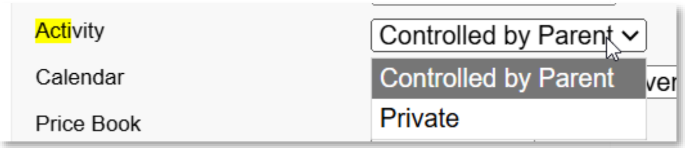
1. Organization-wide Sharing Settings
2. Role Hierarchy & Sharing Rules*
3. User's Profile
4. User's Permission Set(s)

* Sharing Rules are used to share records when the Object is set to Private and dictate which records Users can see based on their Role.

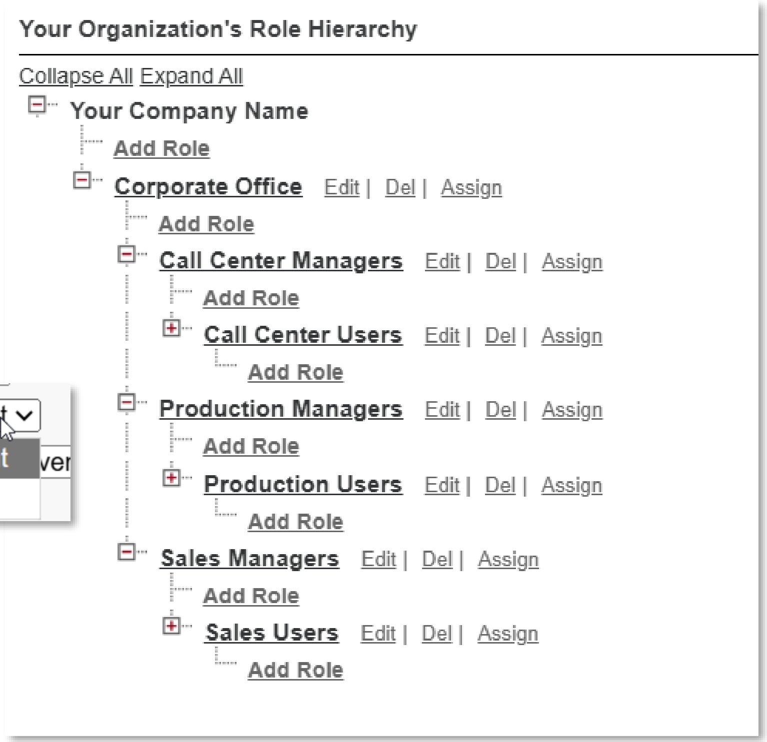
User Role Hierarchy

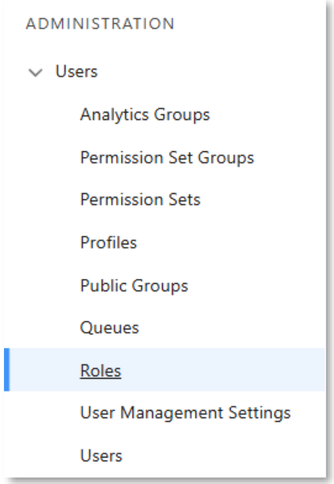
Roles are most used for Calendar Event sharing

Reason: Users in a primary Role (ie: Managers) need to add/delete Calendar Events from User’s Calendars in the Subordinate Role.



Sharing Settings > Activity > Controlled by Parent

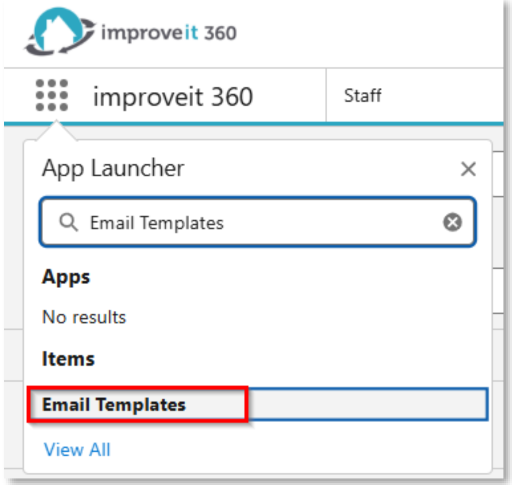




How to Edit Email Templates

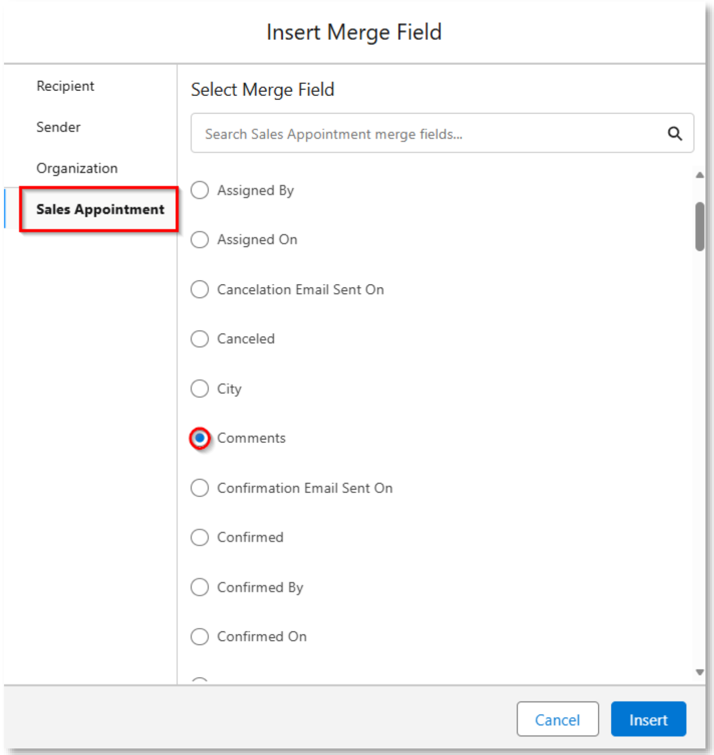
App Launcher > Email Templates

Email Template Guide



NOTE:
Always select the Object where the Email is being sent from

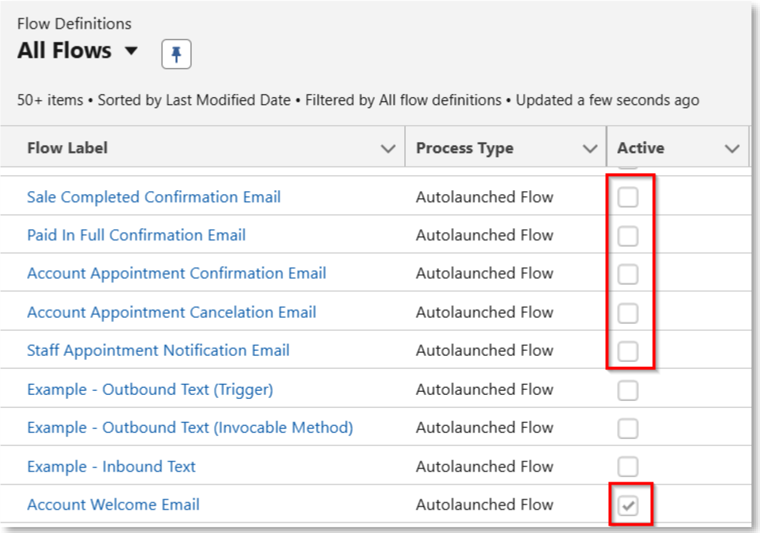
Watch a video to guide you!



Permission Set: Lightning Email Builder

Which Email Templates are sending?

Automated Emails : Setup > Flows



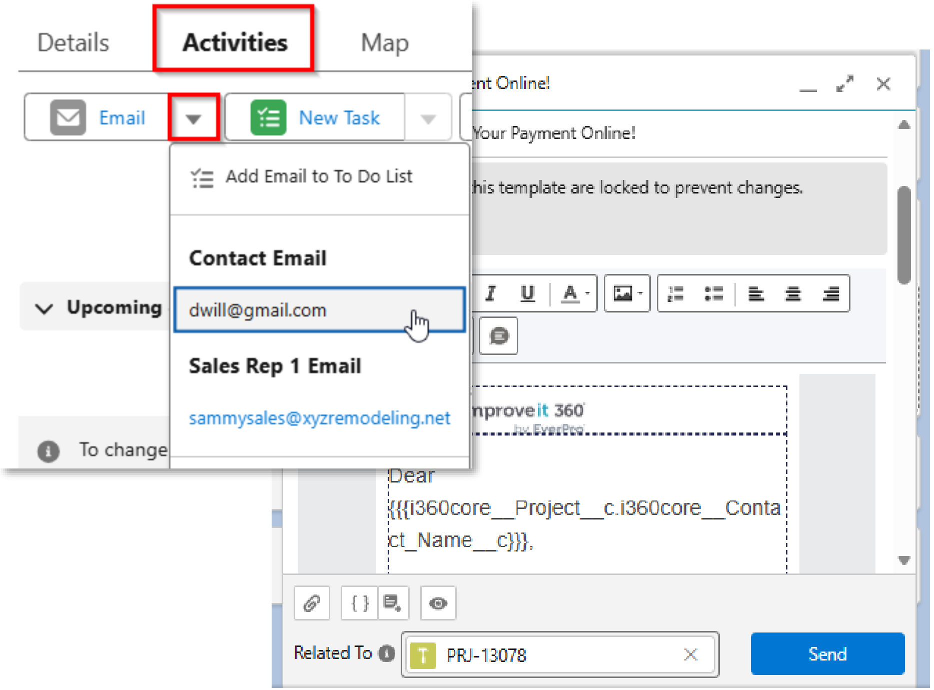
Flow Definitions

All Flows

50+ items • Sorted by Last Modified Date • Filtered by All flow definitions • Updated a few seconds ago

Flow Label	Process Type	Active
Sale Completed Confirmation Email	Autolaunched Flow	☐
Paid In Full Confirmation Email	Autolaunched Flow	☐
Account Appointment Confirmation Email	Autolaunched Flow	☐
Account Appointment Cancelation Email	Autolaunched Flow	☐
Staff Appointment Notification Email	Autolaunched Flow	☐
Example - Outbound Text (Trigger)	Autolaunched Flow	☐
Example - Outbound Text (Invocable Method)	Autolaunched Flow	☐
Example - Inbound Text	Autolaunched Flow	☐
Account Welcome Email	Autolaunched Flow	☑

Manual Emails can be sent from the **Activities** Tab on every major object



[How to Add the **Activities** Tab to a page]()

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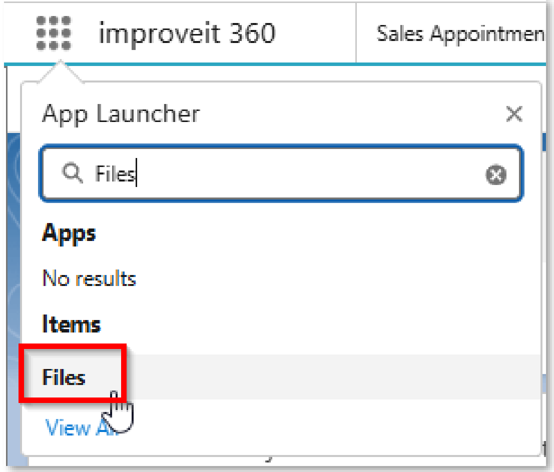
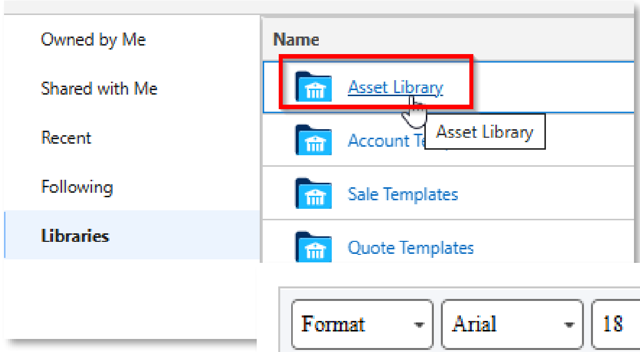
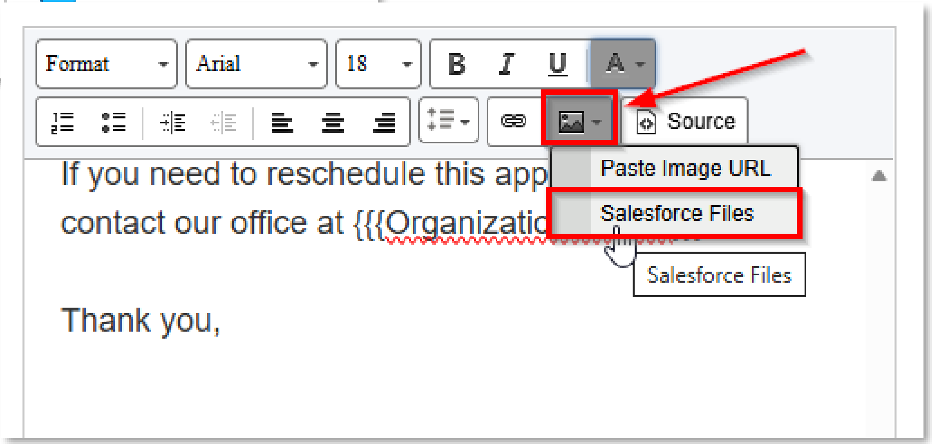
How to Add Images to Templates

App Launcher > Files > Libraries > Asset Library





Email Templates > Edit in Builder



Resulting all Sales Appointments

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Sales Appointments

Past without Result

Status Detail

Demoed, Not Sold

Appointment Date/...	Sales Rep 1	Status	Status Detail
11/26/2025, 2:00 PM	Steven Service	Pending	Assigned
11/25/2025, 9:00 AM	Sammy Sales	Pending	Set
11/24/2025, 10:30 AM	Steve Sales Guy	Pending	Assigned
11/25/2025, 9:00 AM	Cecil Sales	Pending	Assigned/Confirmed
11/26/2025, 9:00 AM	Cecil Sales	Pending	Set
11/28/2025, 10:00 AM	Steve Sales Guy	Pending	Assigned
11/24/2025, 9:00 AM		Pending	Confirmed
4/25/2025, 9:00 AM		Pending	Confirmed
5/1/2025, 2:00 PM		Pending	Set

Sales Opportunities

Baths

Result

Not Sold

Result Detail

Demoed and Quoted

Comments

Master bathroom, Tub/Shower replacement, walk-in Tub.

Project Budget

8,500.00

Appointment Report Count Fields

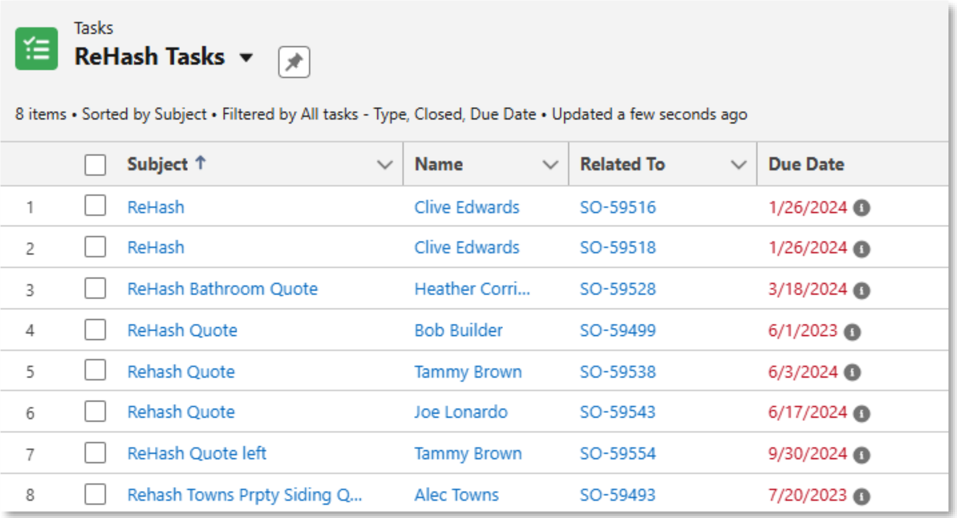
<-----Reporting Fields---->

Sales Appointment Status Detail		Sold	Demoed	Not Confirmed	Canceled	Issued	Set	Ran
Sold		■	■			■	■	
One leg			■			■	■	
Not Demoed						■	■	
No Show						■	■	
Follow-up			■			■	■	
Demoed, Not Sold			■			■	■	
Canceled					■		■	
Any Status Detail + Stauts = Ran							■	■
Confirmed On Date is Blank				■			■	

What happened on the Sales Appointment?

Work Rehash Opportunities

Use Tasks and Task List Views to work Rehash Opportunities

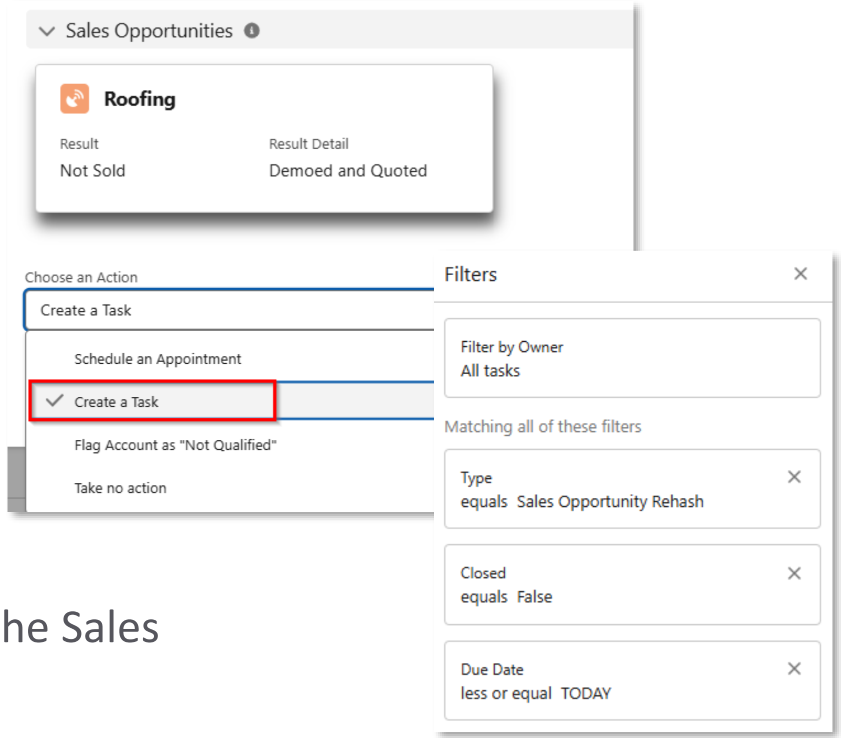


Tasks

ReHash Tasks

8 items • Sorted by Subject • Filtered by All tasks - Type, Closed, Due Date • Updated a few seconds ago

	Subject	Name	Related To	Due Date
1	ReHash	Clive Edwards	SO-59516	1/26/2024
2	ReHash	Clive Edwards	SO-59518	1/26/2024
3	ReHash Bathroom Quote	Heather Corri...	SO-59528	3/18/2024
4	ReHash Quote	Bob Builder	SO-59499	6/1/2023
5	Rehash Quote	Tammy Brown	SO-59538	6/3/2024
6	Rehash Quote	Joe Lonardo	SO-59543	6/17/2024
7	ReHash Quote left	Tammy Brown	SO-59554	9/30/2024
8	Rehash Towns Prpty Siding Q...	Alec Towns	SO-59493	7/20/2023



*Tasks can be created off the Inquiry object, or the Sales Opportunity object

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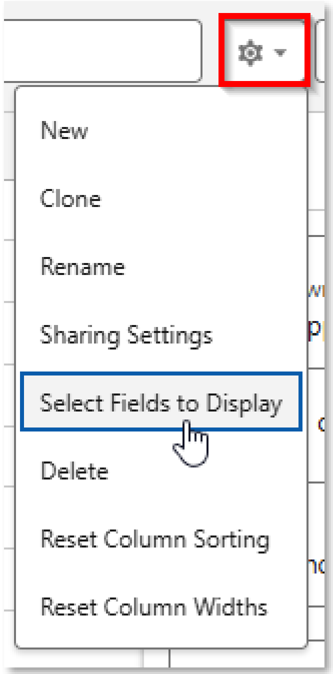
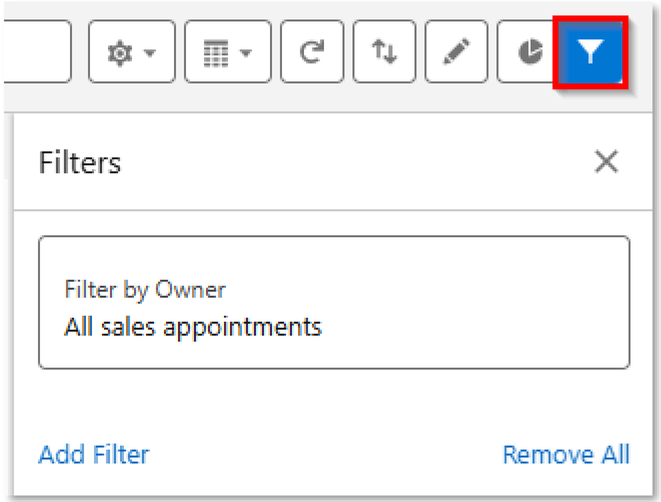
List Views – How to Edit

Profile Permissions needed & Edit User Profiles

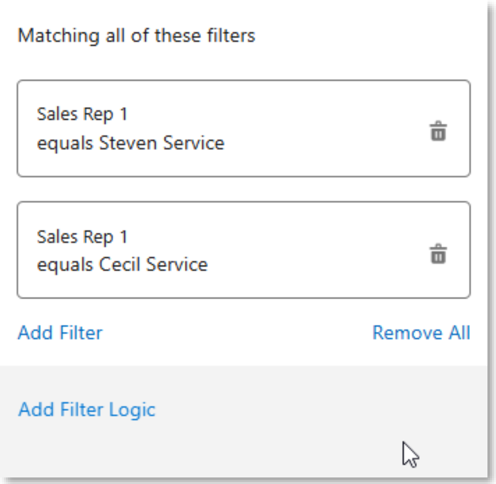


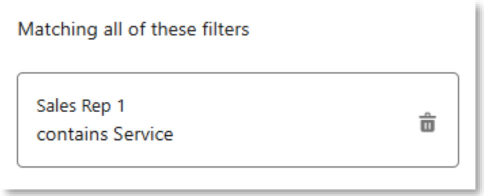
Select Fields to Display allows you to choose the Fields visible in the List

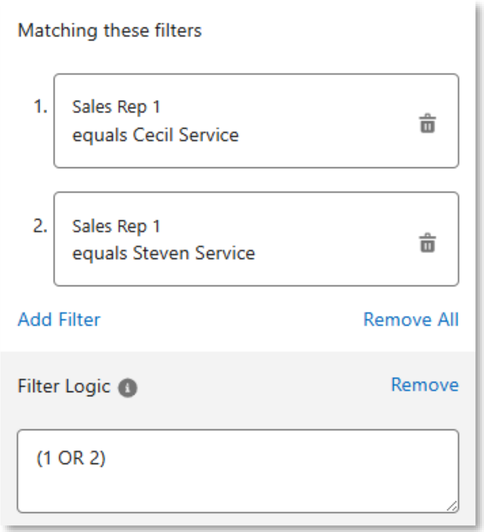
Filters determine which records should be shown in the List



Understanding Filter Conditions







AND Filter Logic in this example would return Zero records, because the Sales Rep 1 field cannot ever be two different people at one time.

Advanced Filter Logic

1. Sales Rep 1
   equals Steven Service
2. Sales Rep 1
   equals Cecil Service
3. Territory
   equals Columbus
4. Territory
   equals Cincinnati
5. Territory
   equals Cleveland

Add Filter   Remove All

Filter Logic   Remove

(1 OR 2) AND (3 OR 4 OR 5)

EQUALS Looks for an Exact match - spelling matters!

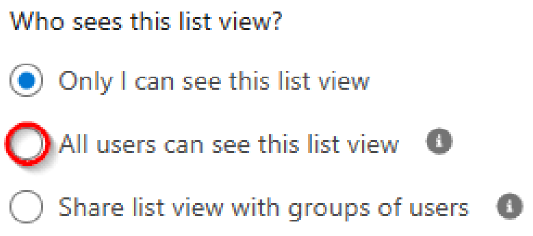
Appointment Date...	C...	Phone	Sales Rep 1	Territory
11/25/2025, 2:00 PM		410-517-8692	Cecil Service	Columbus
12/13/2023, 12:00 PM		6145176836	Ingrid Inside Sa...	Cleveland
12/20/2023, 1:00 PM		6145176836	Steven Service	Cleveland
7/25/2023, 8:00 AM		614-589-5526	Olivia Admin	Columbus
7/25/2023, 6:00 PM		740-965-8956	Olivia Admin	Columbus
7/11/2023, 10:00 AM		740-965-8956	Sylvia Sales	Columbus

Why does my list show too many records?

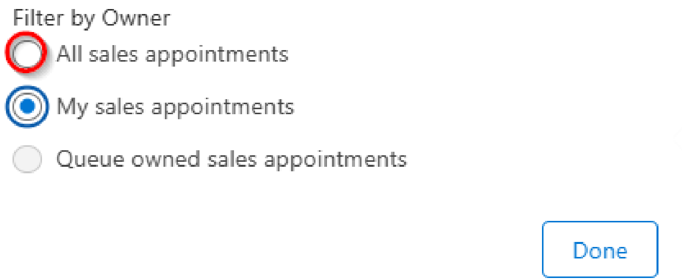
(1 OR 2 OR 3 OR 4 OR 5)

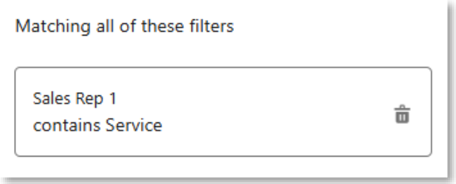
Creating a New List View

1. Set who can see the List



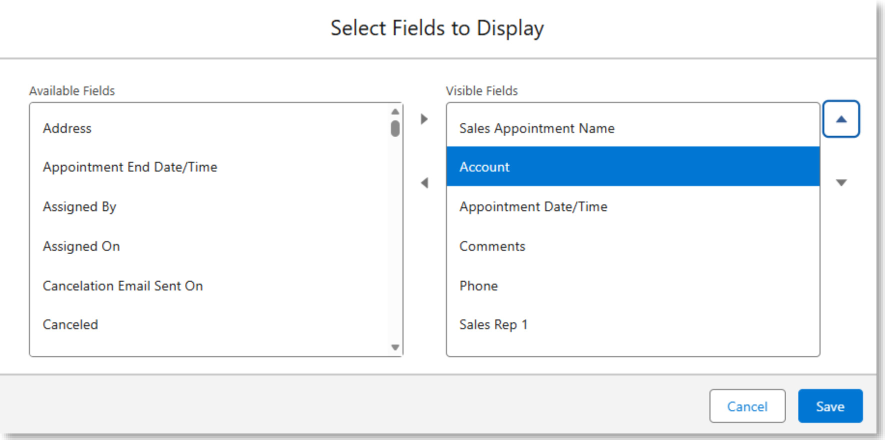
2. Set the Owner Filter to All User's Sales Appointments





3. Add Your Desired Filters

4. Select the Fields to Display in the List

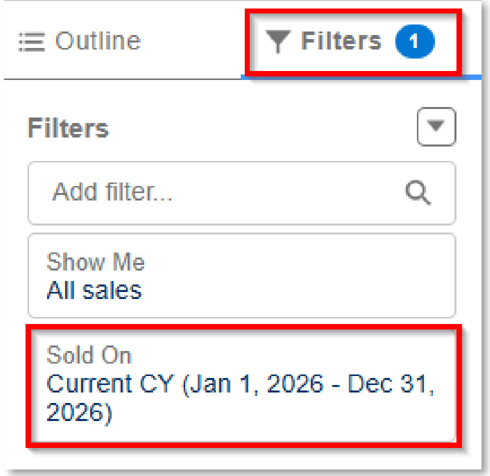


Reports – out of the box

#	Name	Type	Folder
1	Active Projects	Summary	Projects
2	All Sales with Outstanding Balance	Summary	Sales
3	All Un-Resulted Appointments	Summary	Appointment
4	Appointment Performance by Rep	Summary	Appointment
5	Appointment Performance Year over Year	Matrix	Appointment
6	Approved Sales without Projects	Tabular	Sales
7	Canceled Sales Report	Summary	Sales
8	Collections by Month YTD	Matrix	Sales
9	Product Sales YTD	Summary	Sales
10	Projects with Project Costs	Summary	Projects
11	Sales Efficiency by Rep	Summary	Sales
12	Sales Opportunity Conversion	Summary	Sales
13	Sales by Month	Summary	Sales
14	Sales by Month by Rep YTD	Matrix	Sales
15	Source Cost Performance	Joined	Lead Sources

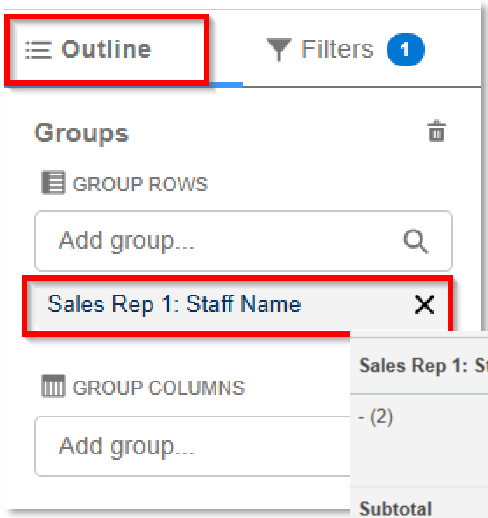
Date Range, Grouping, Sort Order

Use the **Filters** Tab to set Date Range

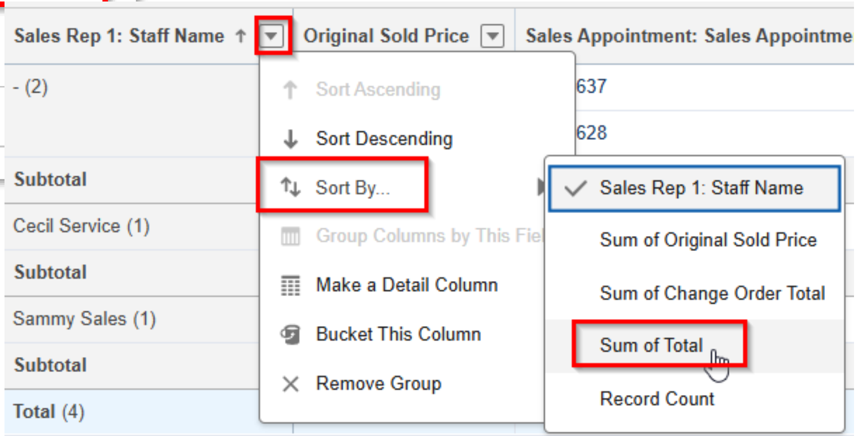


SF Relative Date Values

Use the **Outline** Tab to the Grouping Field

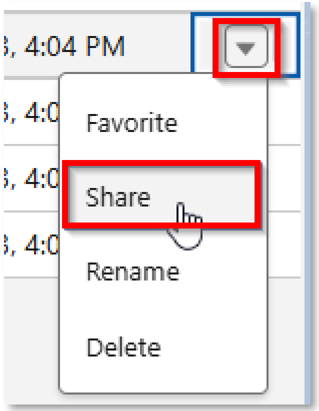


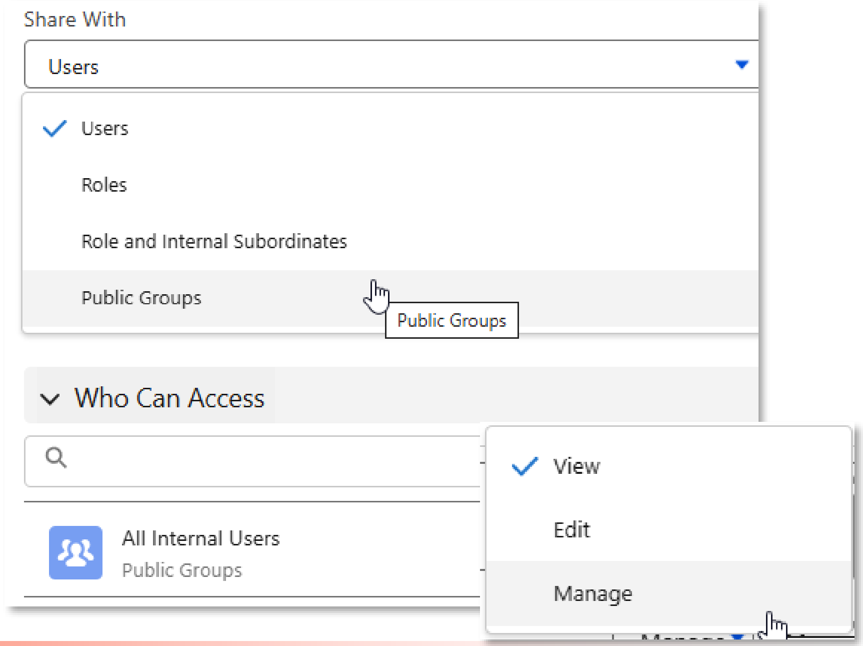
Sort data in the **Preview** pane



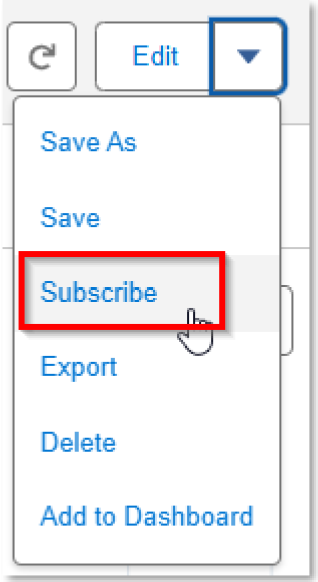
Share and Subscribe to Reports

Users need to be shared
Report Folders
Reports Tab > All Folders > Share





Run the Report.
Use the Down
arrow to Subscribe

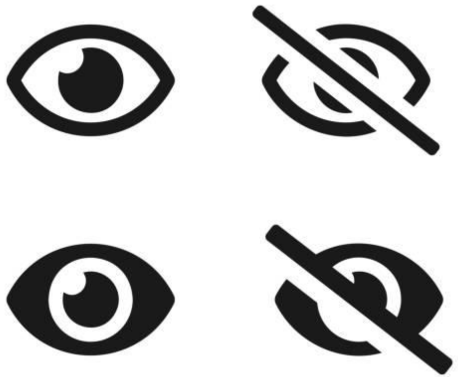


Field Level Security

Field Permissions

Field Name	Field API Name	☐ Read Access	☐ Edit Access
Account	i360core__Account__c	☑	☑
Address	i360core__Address__c	☑	☑
Appointment Date/Time	i360core__Appointment_Date_Time__c	☑	☑
Appointment End Date/Time	i360core__Appointment_End_Date_Time__c	☑	☐
Assigned By	i360core__Assigned_By__c	☑	☑
Assigned On	i360core__Assigned_On__c	☑	☑
Cancelation Email Sent On	i360core__Cancelation_Email_Sent_On__c	☑	☑
Canceled	i360core__Canceled__c	☑	☐
City	i360core__City__c	☑	☐
Comments	i360core__Comments__c	☐	☐
Confirmation Email Sent On	i360core__Confirmation_Email_Sent_On__c	☑	☑
Confirmed	i360core__Confirmed__c	☑	☐
Confirmed By	i360core__Confirmed_By__c	☑	☑
Confirmed checkmark	Confirmed_checkmark__c	☑	☐
Confirmed On	i360core__Confirmed_On__c	☑	☑
Contact	i360core__Contact__c	☑	☑
Contact Email	i360core__Contact_Email__c	☑	☑
Contact Has Opted Out Of Email	i360core__Contact_Has_Opted_Out_Of_Email__c	☑	☐
Contact Name	i360core__Contact_Name__c	☑	☐
Contact Phone	Contact_Phone__c	☑	☐
Country	i360core__Country__c	☑	☐
Created By	CreatedById	☑	☐
Custom Calendar HTML	i360core__Custom_Calendar_HTML__c	☑	☑
Custom Calendar Text	i360core__Custom_Calendar_Text__c	☑	☑
Demoed	i360core__Demoed__c	☑	☑
Duration (hours)	i360core__Duration__c	☑	☑

Setup > Profiles > Object Settings > Field Permissions > Read/Edit Access



In this example screen shot, the User Profile does not have access to Read or Edit the Comments field

Field History Tracking

Add related list for History to the page layout

	Sales Appointment: Sales Appointment Name	Edited By	Field / Event	Old Value	New Value	Edit Date ↓
1	SA-59630	Emma Heiberger	Sales Rep 1	Ingrid Inside Sales	Cecil Sales	2/18/2026, 3:09 PM
2	SA-59604	Emma Heiberger	Sales Rep 1	Steven Service	Sammy Sales	2/18/2026, 3:08 PM
3	SA-59579	Emma Heiberger	Sales Rep 1	Steven Service	Cecil Sales	2/17/2026, 1:32 PM

See changes using a **History** Report Type.

Report Type Name
Sales Appointment History

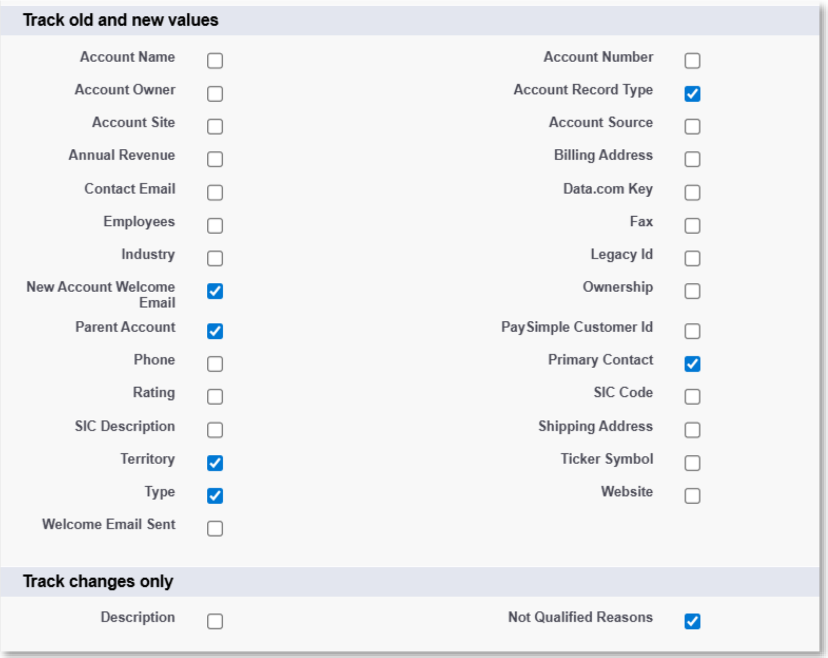
Set History Tracking

On each Object, up to 20 Fields can track the changes made to the data within the fields*

*limitations on text field data changes

Field History Tracking

Setup > Object Manager > choose object > Fields & Relationships > Set History Tracking

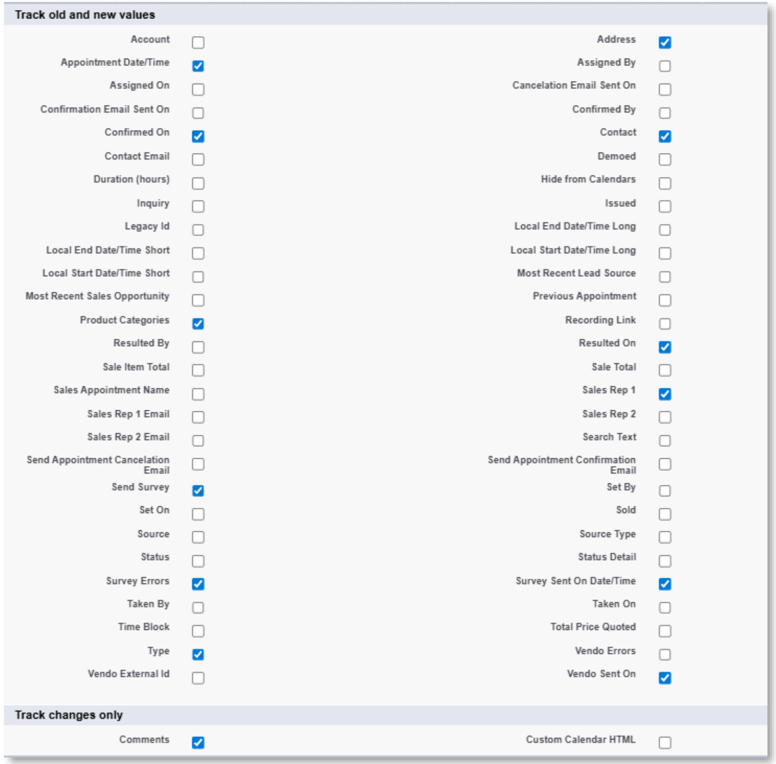


Track old and new values

Account Name	[ ]	Account Number	[ ]
Account Owner	[ ]	Account Record Type	[x]
Account Site	[ ]	Account Source	[ ]
Annual Revenue	[ ]	Billing Address	[ ]
Contact Email	[ ]	Data.com Key	[ ]
Employees	[ ]	Fax	[ ]
Industry	[ ]	Legacy Id	[ ]
New Account Welcome Email	[x]	Ownership	[ ]
Parent Account	[x]	PaySimple Customer Id	[ ]
Phone	[ ]	Primary Contact	[x]
Rating	[ ]	SIC Code	[ ]
SIC Description	[ ]	Shipping Address	[ ]
Territory	[x]	Ticker Symbol	[ ]
Type	[x]	Website	[ ]
Welcome Email Sent	[ ]		

Track changes only

Description	[ ]	Not Qualified Reasons	[x]



Track old and new values

Account	[ ]	Address	[x]
Appointment Date/Time	[x]	Assigned By	[ ]
Assigned On	[ ]	Cancelation Email Sent On	[ ]
Confirmation Email Sent On	[ ]	Confirmed By	[ ]
Confirmed On	[x]	Contact	[x]
Contact Email	[ ]	Demoed	[ ]
Duration (hours)	[ ]	Hide from Calendars	[ ]
Inquiry	[ ]	Issued	[ ]
Legacy Id	[ ]	Local End Date/Time Long	[ ]
Local End Date/Time Short	[ ]	Local Start Date/Time Long	[ ]
Local Start Date/Time Short	[ ]	Most Recent Lead Source	[ ]
Most Recent Sales Opportunity	[ ]	Previous Appointment	[ ]
Product Categories	[x]	Recording Link	[ ]
Resulted By	[ ]	Resulted On	[x]
Sale Item Total	[ ]	Sale Total	[ ]
Sales Appointment Name	[ ]	Sales Rep 1	[x]
Sales Rep 1 Email	[ ]	Sales Rep 2	[ ]
Sales Rep 2 Email	[ ]	Search Text	[ ]
Send Appointment Cancelation Email	[ ]	Send Appointment Confirmation Email	[ ]
Send Survey	[x]	Set By	[ ]
Set On	[ ]	Sold	[ ]
Source	[ ]	Source Type	[ ]
Status	[ ]	Status Detail	[ ]
Survey Errors	[x]	Survey Sent On Date/Time	[x]
Taken By	[ ]	Taken On	[ ]
Time Block	[ ]	Total Price Quoted	[ ]
Type	[x]	Vendo Errors	[ ]
Vendo External Id	[ ]	Vendo Sent On	[x]

Track changes only

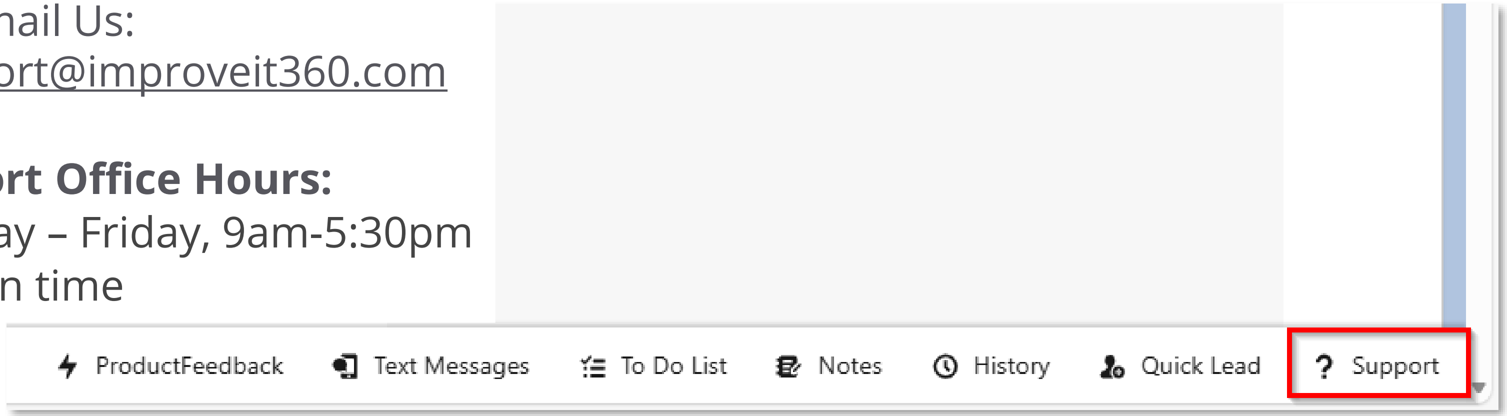
Comments	[x]	Custom Calendar HTML	[ ]

How to Reach Us

1. Use the Tab in your Utility Bar to find **Support**
2. Open a Ticket at: https://i360lightning.zendesk.com/
3. Or Email Us: support@improveit360.com

Support Office Hours:
Monday – Friday, 9am-5:30pm
Eastern time

Product Feedback goes straight to our Dev Team!



Thanks for Attending

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