Technical Diagrams

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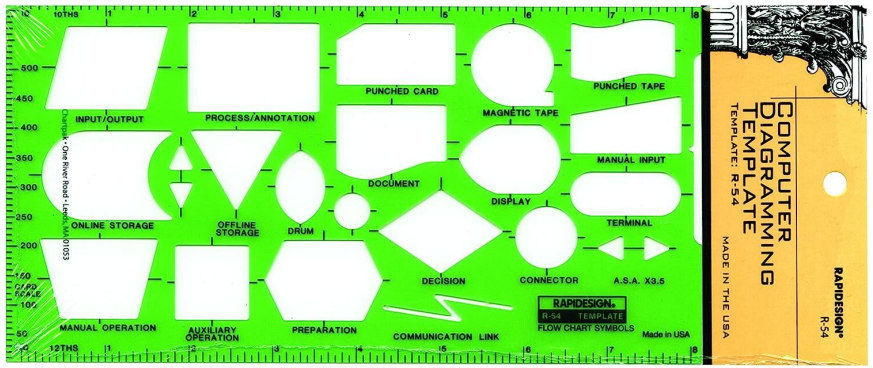
Tools

- Lucidchart (paid)
- Draw.io (free)
- Visio (paid | Microsoft)
- Pencil/Paper/Template (free/paid)



Benefits of Diagramming

1. **Visual Representation**: Technical diagrams provide a visual representation of complex systems or processes, making it easier to understand and communicate intricate concepts and relationships within Salesforce.

2. **Clarity and Communication**: Diagrams help in conveying information clearly and concisely. They enable teams to align their understanding of Salesforce configurations, integrations, and data flows, leading to improved communication and collaboration.

3. **Documentation and Documentation**: Diagrams serve as valuable documentation assets. They capture the current state of Salesforce implementations, including custom objects, relationships, workflows, and automation. This documentation helps in onboarding new team members, troubleshooting, and planning future enhancements.

4. **Analysis and Optimization**: By visualizing the Salesforce architecture, diagrams can highlight potential bottlenecks, inefficiencies, or areas for improvement. They facilitate analysis of data flows, process automation, and system integrations, allowing for optimization and streamlining of business processes.

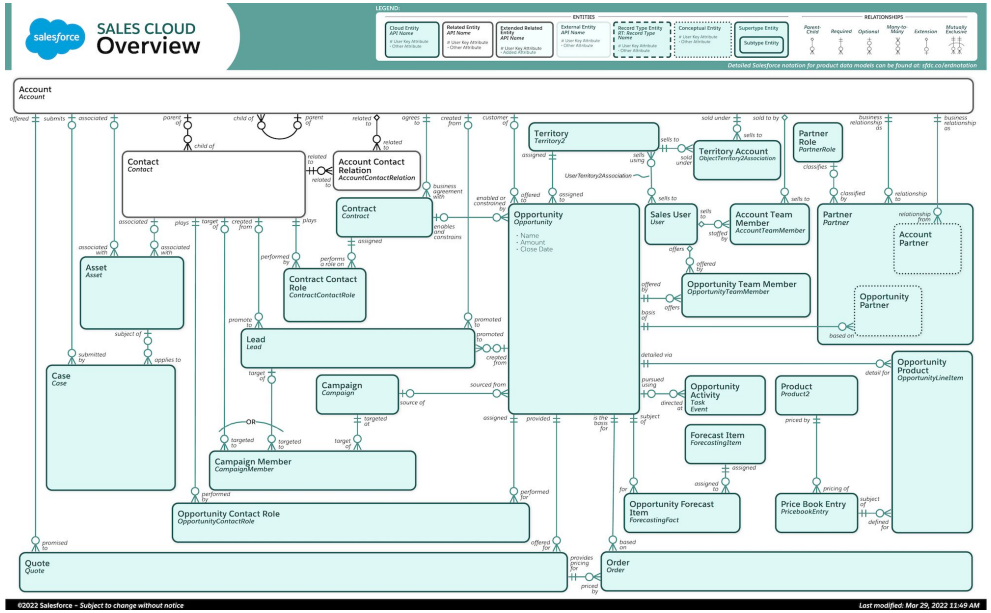
5. **Scalability and Planning**: Salesforce diagrams assist in planning for scalability and growth. They provide a clear overview of the existing structure, helping administrators and architects identify areas where the system can be expanded, integrated with other applications, or customized to meet evolving business needs.

6. **Training and Education**: Technical diagrams can be used as training materials to educate Salesforce users or administrators. They simplify complex concepts, making it easier for individuals to grasp the functionalities and relationships within the system.

ERD or Data Model

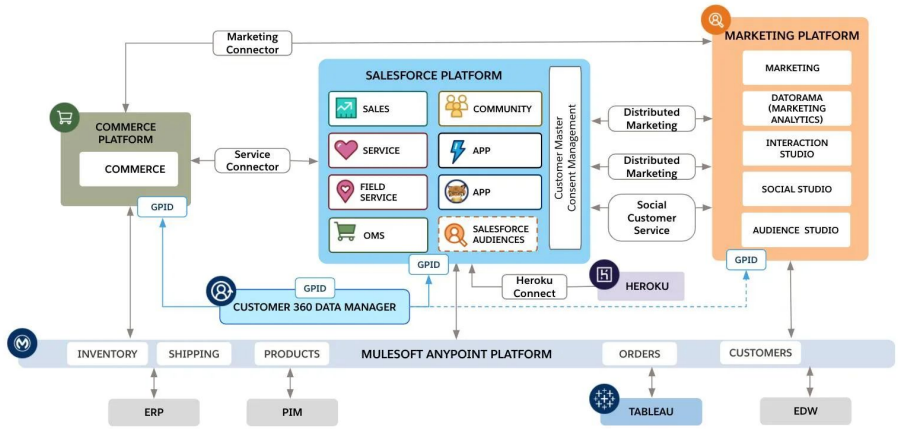
An ERD, or Entity-Relationship Diagram, is a visual representation of the relationships between entities (or objects) in a database. It illustrates how different entities are related to each other and the nature of those relationships, such as one-to-one, one-to-many, or many-to-many.

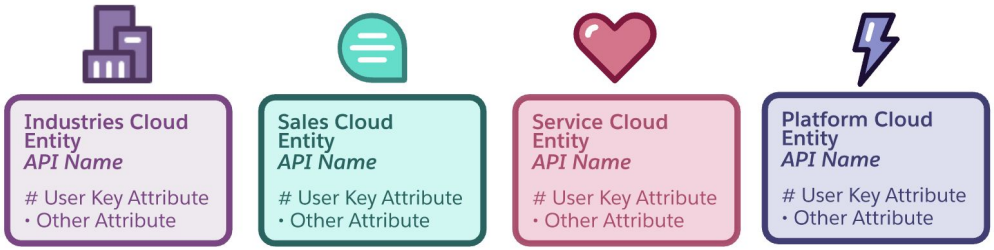
ERDs are used to design and document database structures, helping to understand the logical organization of data and inform the creation of database schemas. They typically consist of entity boxes representing tables and lines connecting these boxes to represent the relationships between the tables.



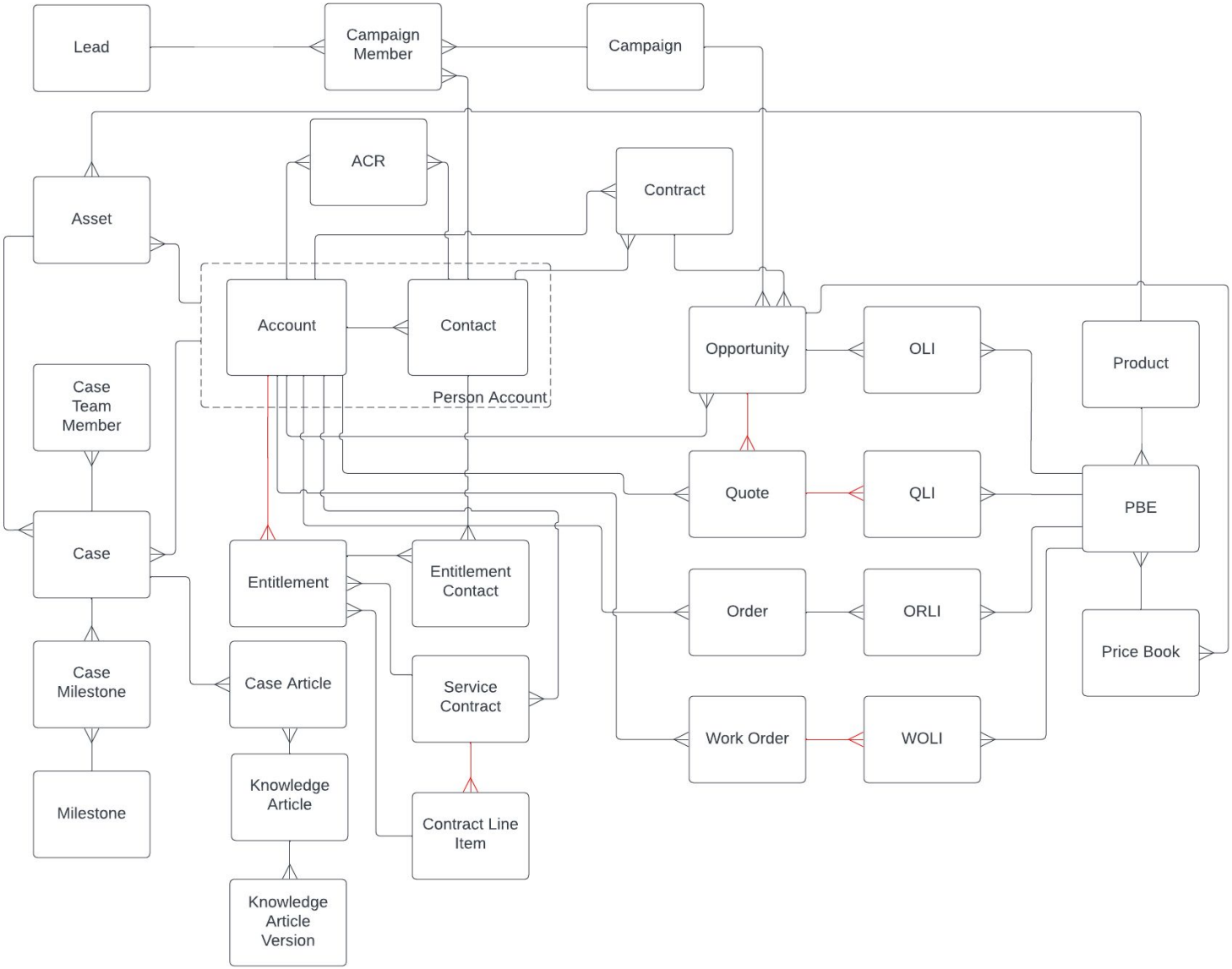
Salesforce Diagramming Framework

- Marketing, Strategy, and Sales Diagrams
- Documentation and Implementation Diagrams
- Salesforce Data Model Notation
- Diagram Kit of Parts

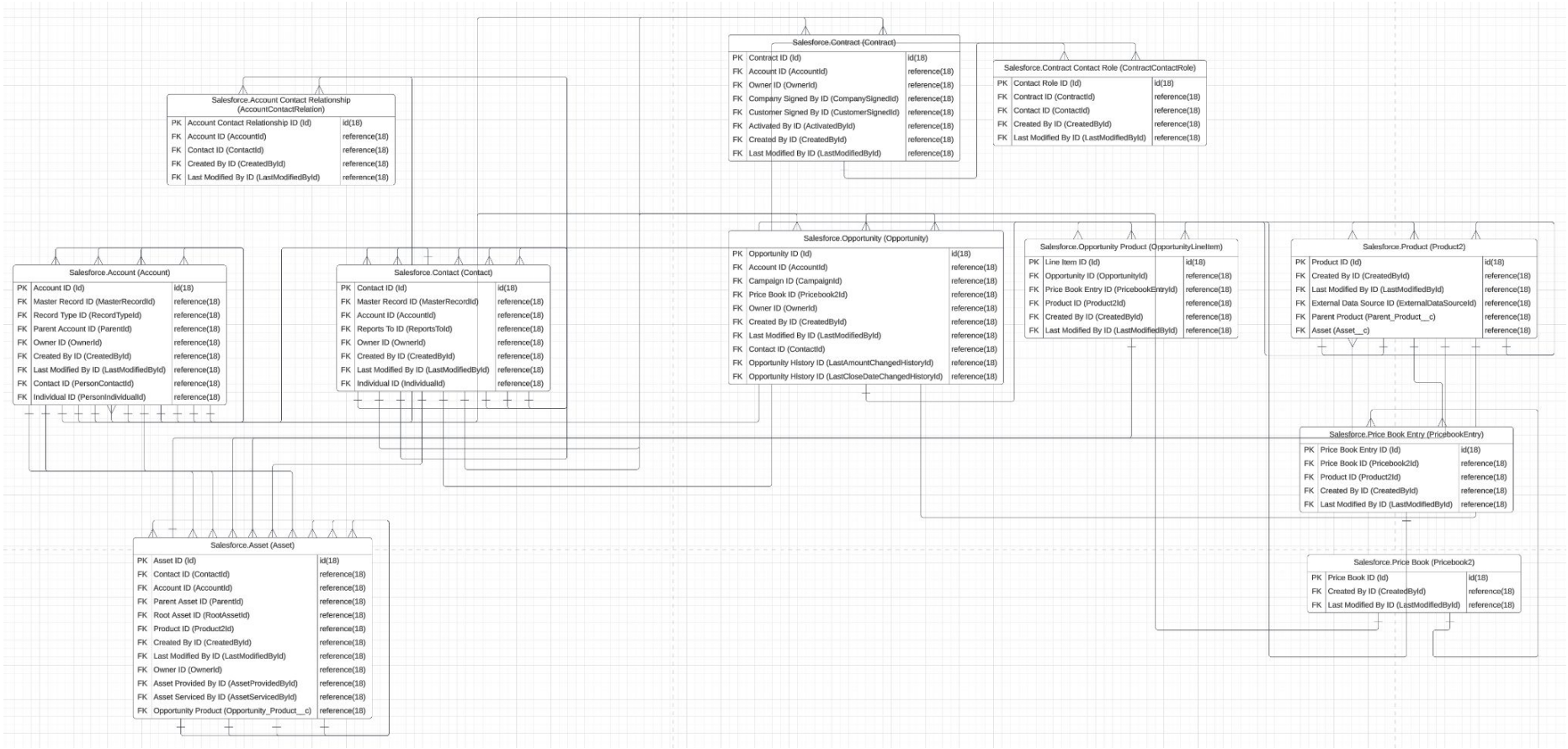




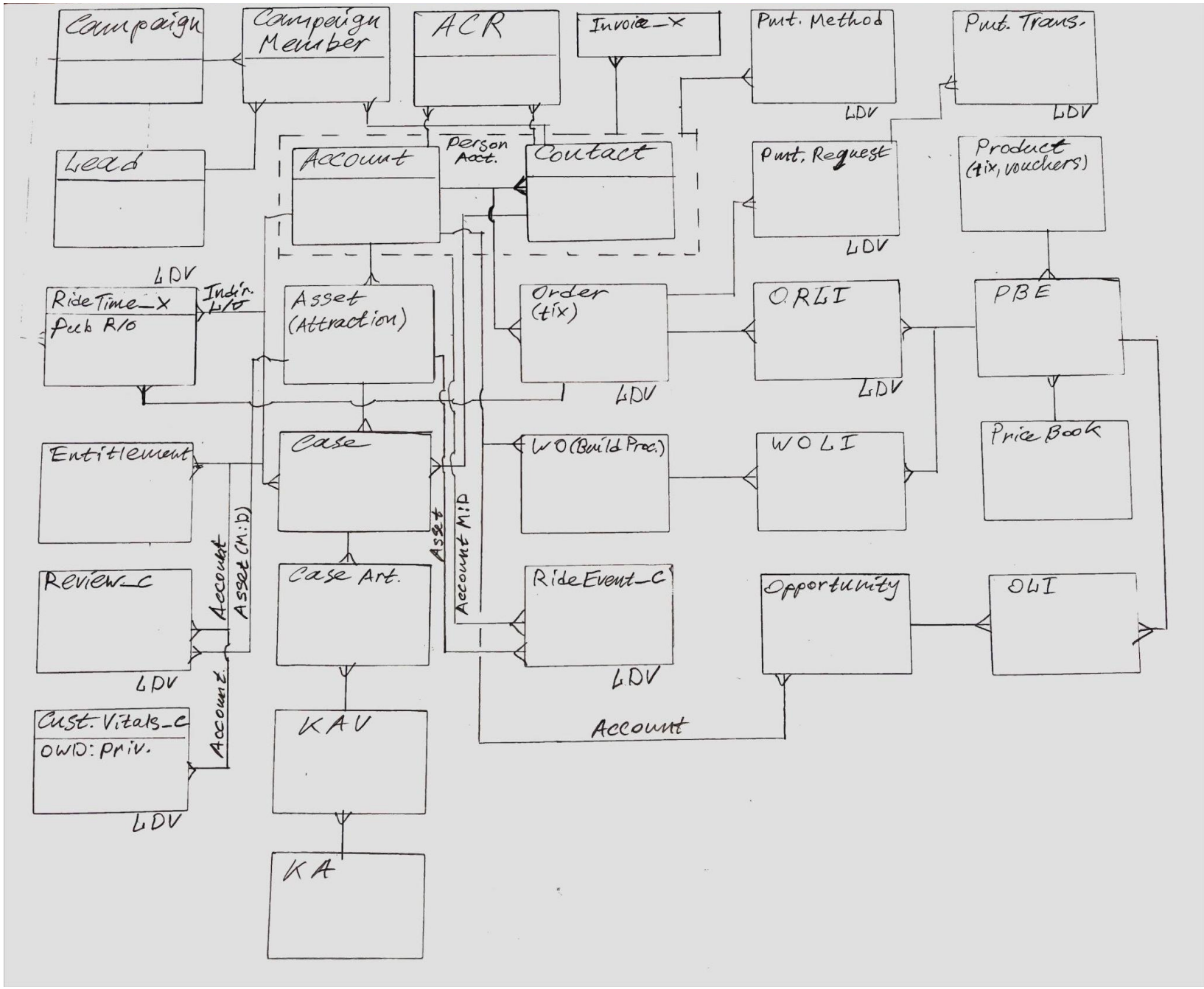
Sales/Service Cloud Data Model



Lucidchart auto-generated Data Model



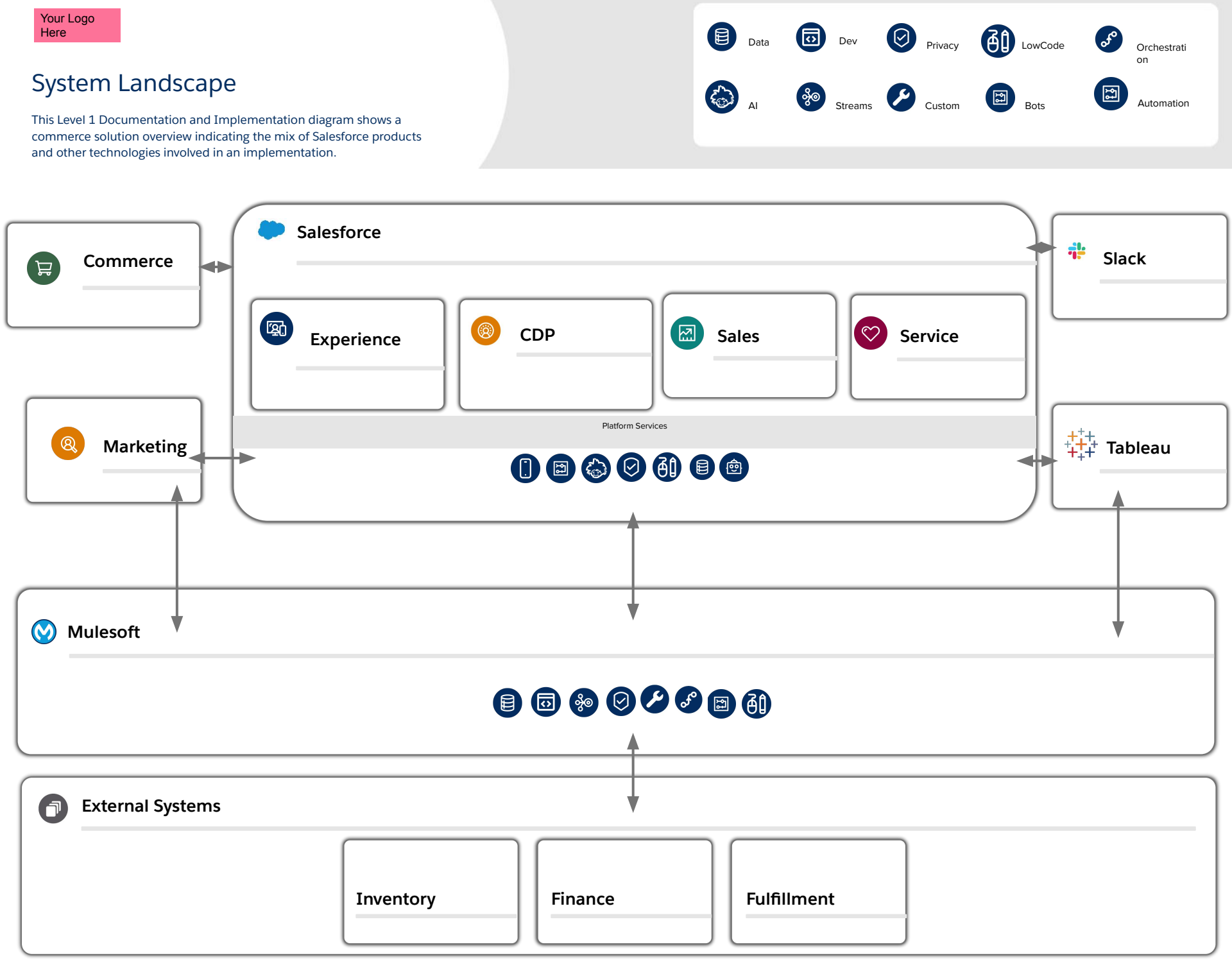
Data Model (paper)

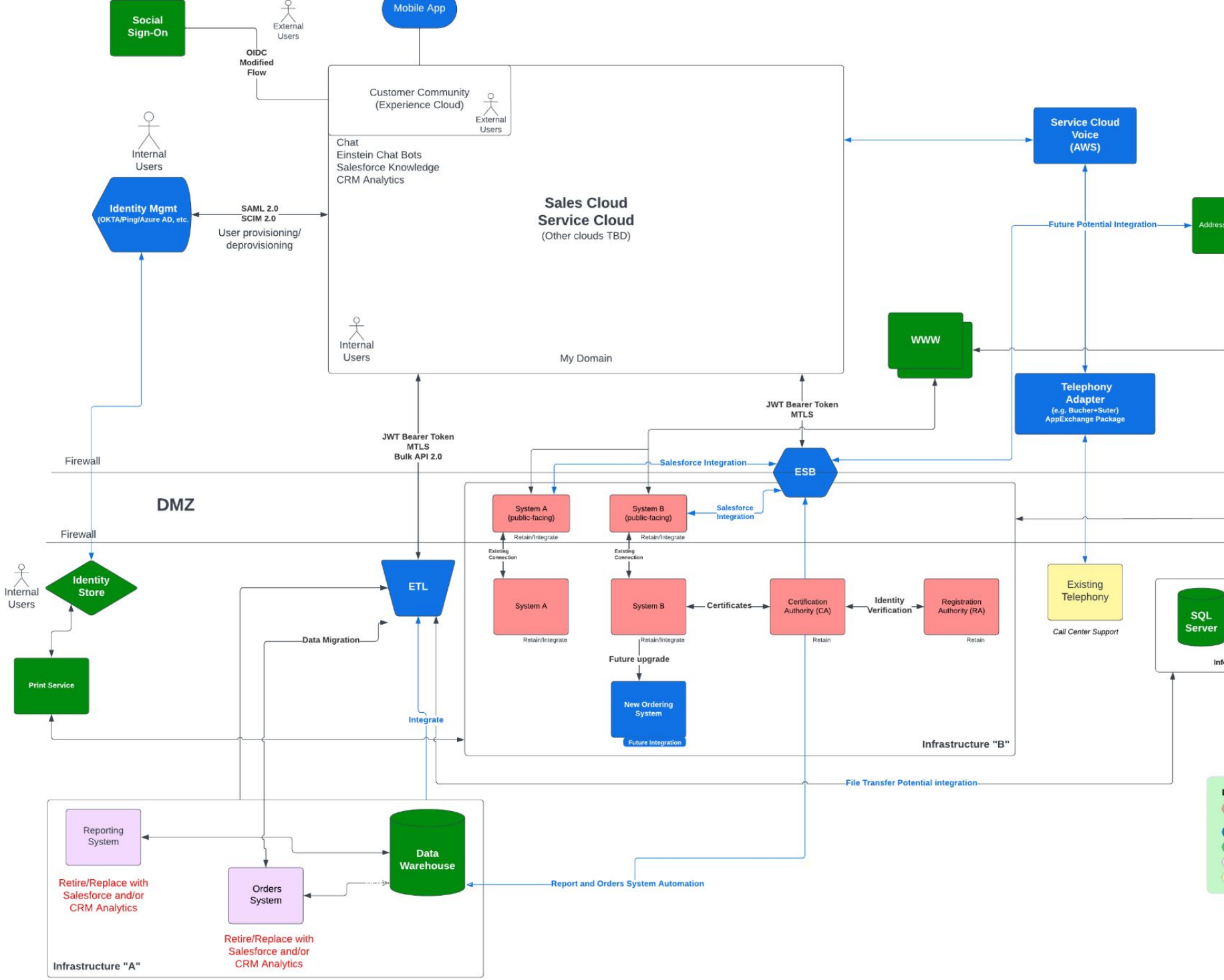


Your Logo Here

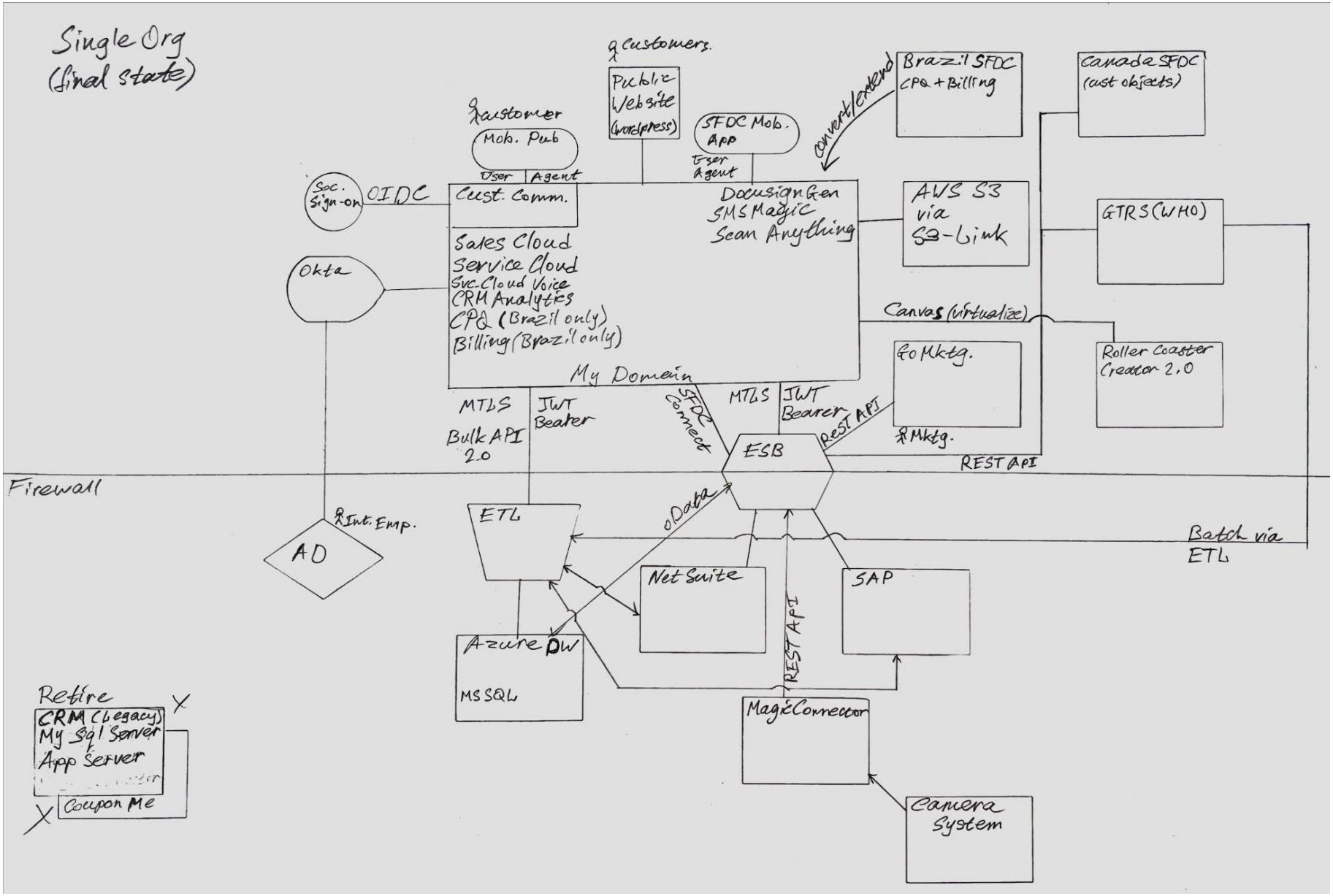
System Landscape

This Level 1 Documentation and Implementation diagram shows a commerce solution overview indicating the mix of Salesforce products and other technologies involved in an implementation.

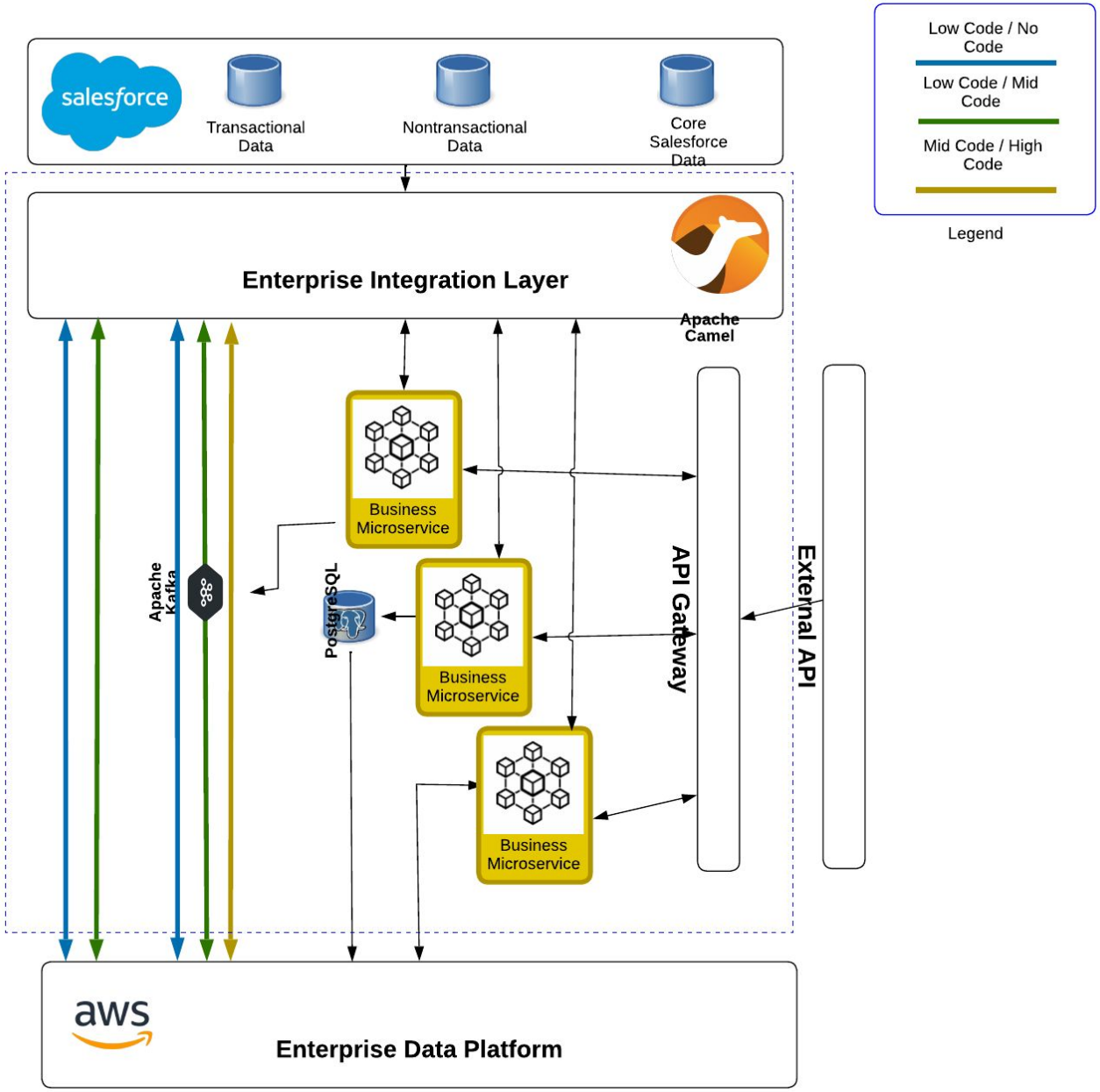



Social Sign-On
External Users
OIDC Modified Flow
Mobile App
Customer Community (Experience Cloud)
External Users
Chat
Einstein Chat Bots
Salesforce Knowledge
CRM Analytics
Internal Users
Identity Mgmt (OKTA/Ping/Azure AD, etc.
SAML 2.0
SCIM 2.0
User provisioning/ deprovisioning
Sales Cloud
Service Cloud
(Other clouds TBD)
Internal Users
My Domain
Service Cloud Voice (AWS)
Future Potential Integration
WWW
Telephony Adapter
(e.g. Bucher+Suter)
AppExchange Package
JWT Bearer Token
MTLS
JWT Bearer Token
MTLS
Bulk API 2.0
Firewall
DMZ
Firewall
Salesforce Integration
ESB
System A (public-facing)
System B (public-facing)
Salesforce Integration
Retain/Integrate
Existing Connection
Internal Users
Identity Store
ETL
System A
System B
Certificates
Certification Authority (CA)
Identity Verification
Registration Authority (RA)
Retain/Integrate
Retain
Existing Telephony
Call Center Support
SQL Server
Data Migration
Future upgrade
New Ordering System
Future Integration
Print Service
Integrate
Infrastructure "B"
File Transfer Potential integration
Reporting System
Data Warehouse
Retire/Replace with Salesforce and/or CRM Analytics
Orders System
Report and Orders System Automation
Retire/Replace with Salesforce and/or CRM Analytics
Infrastructure "A"

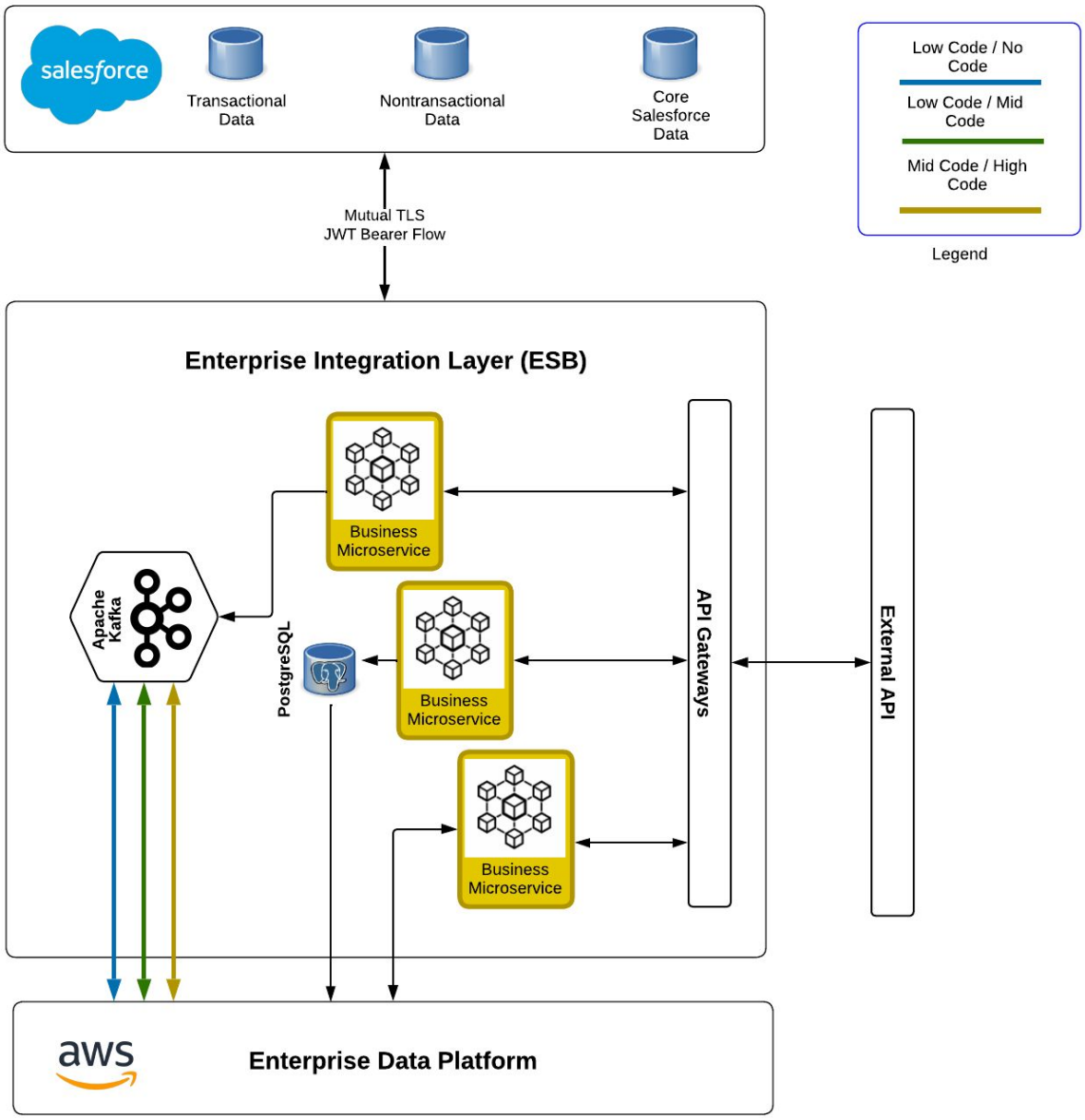
System Landscape (paper)



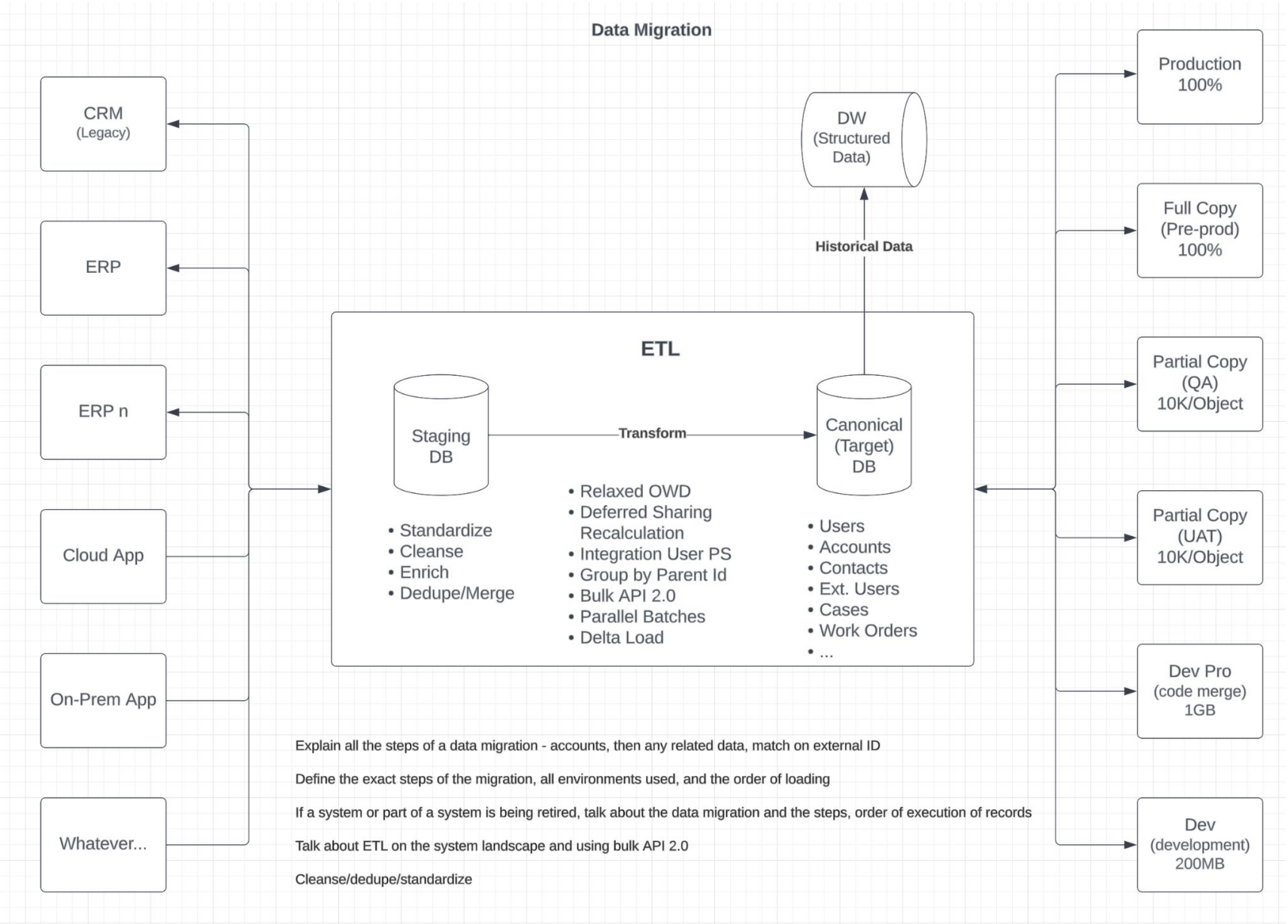
Ambiguous Diagram



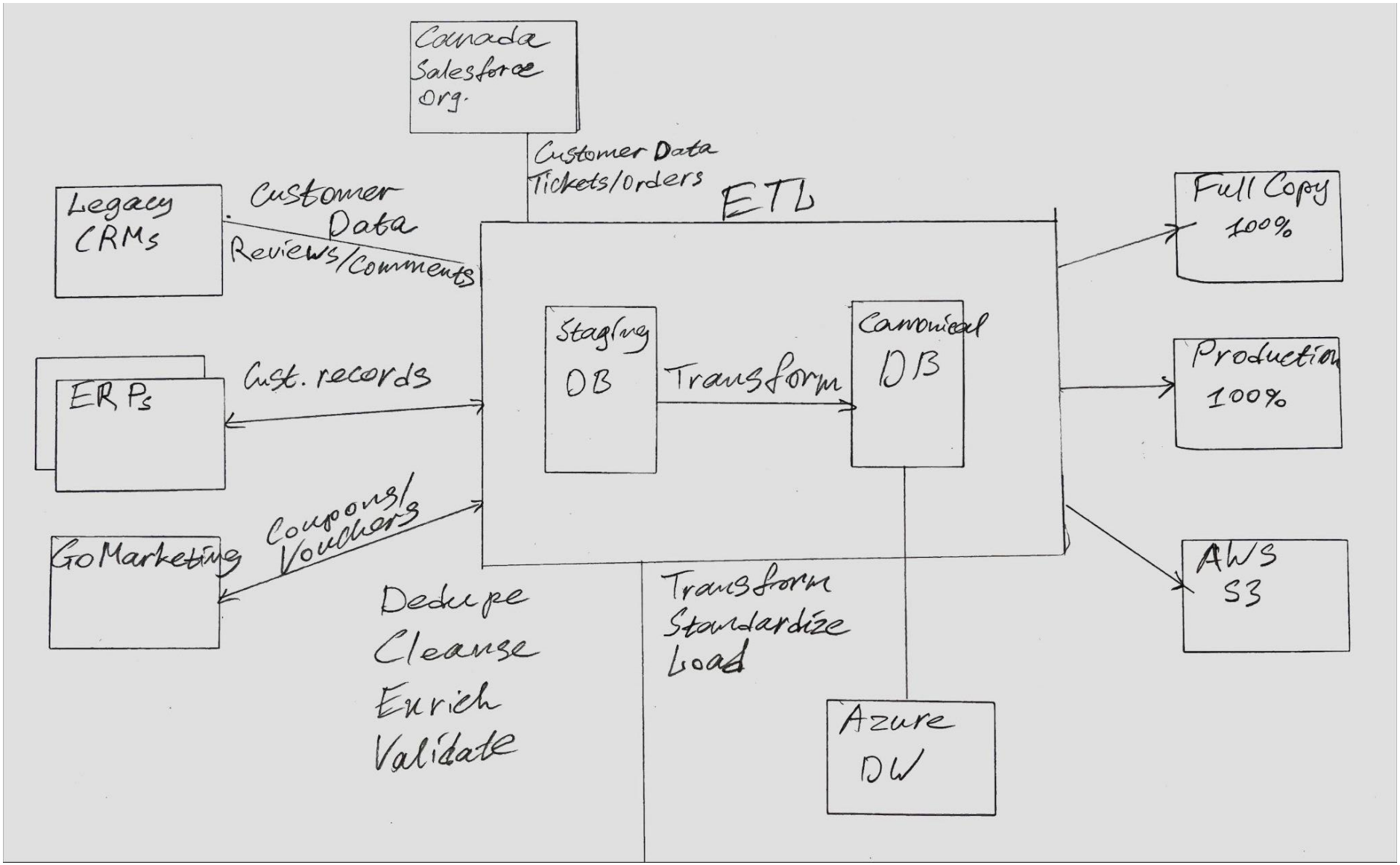
Removing Ambiguity



Data Migration Diagram

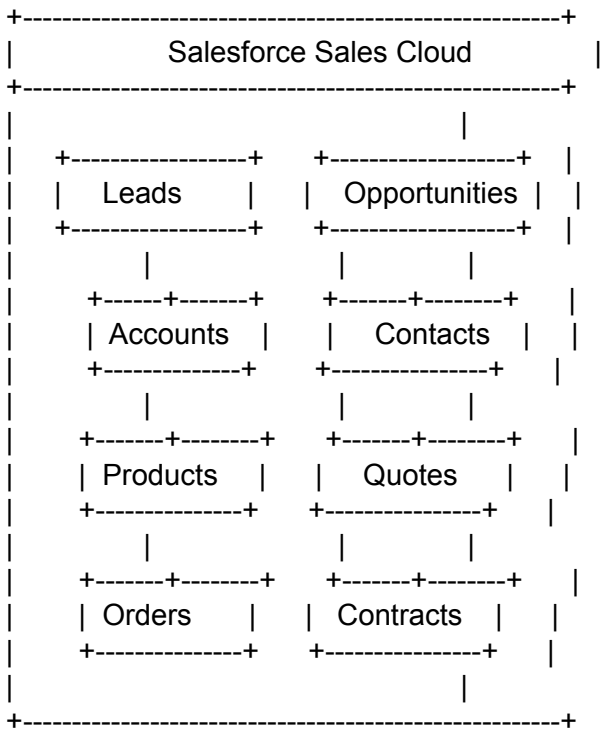


Data Migration (paper)

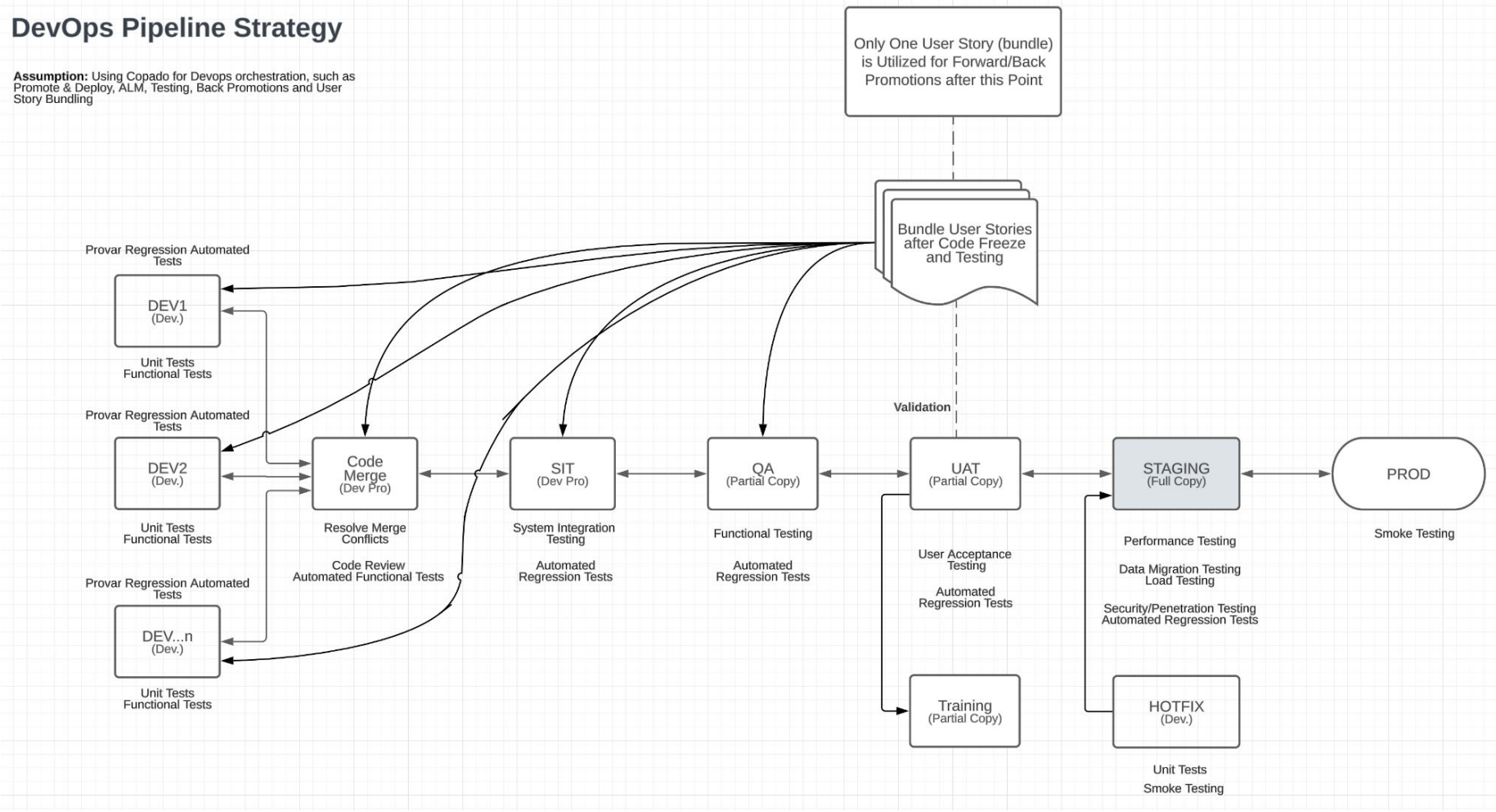


ChatGPT

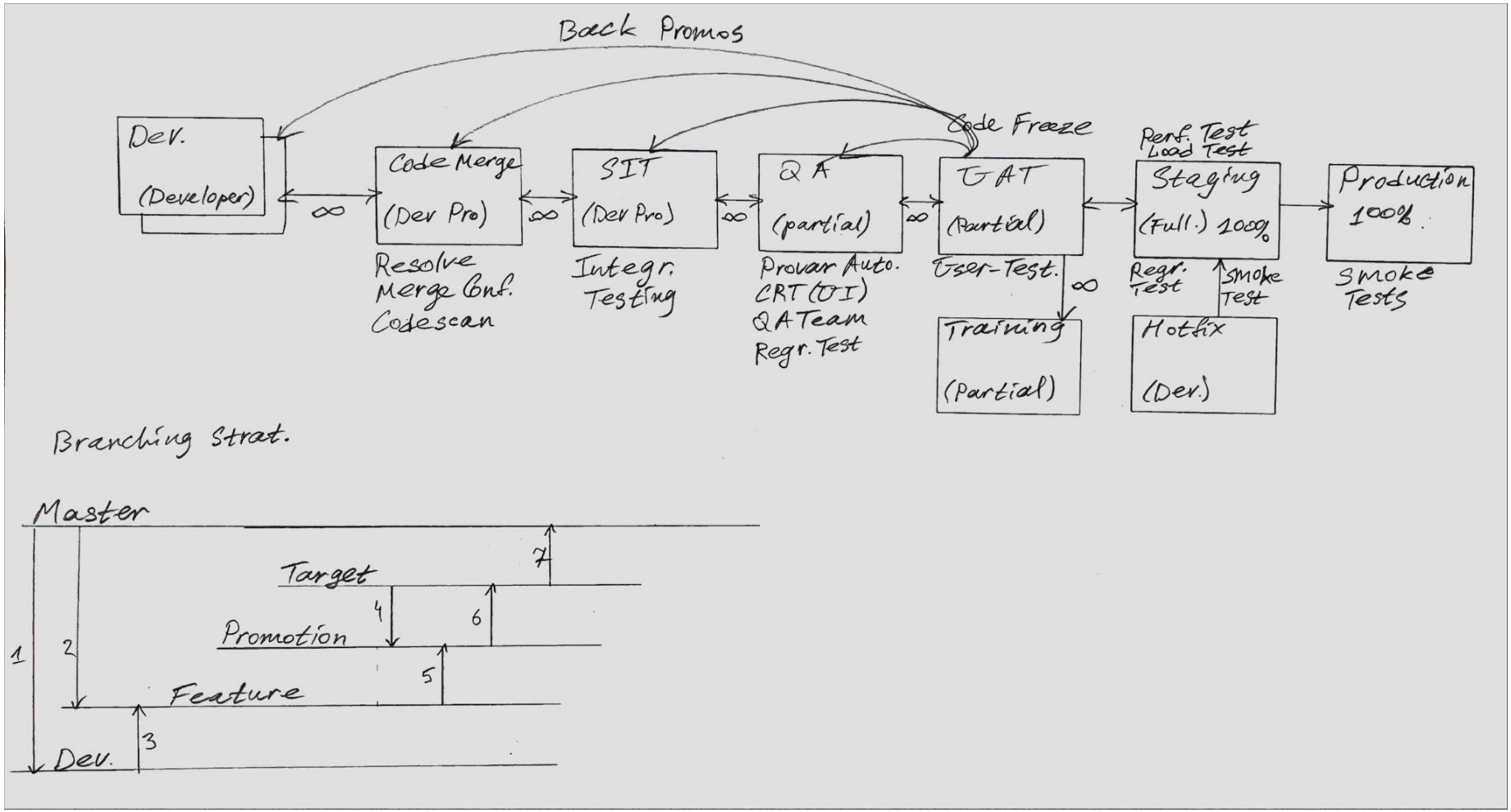
- This is an example of how not to produce technical diagrams



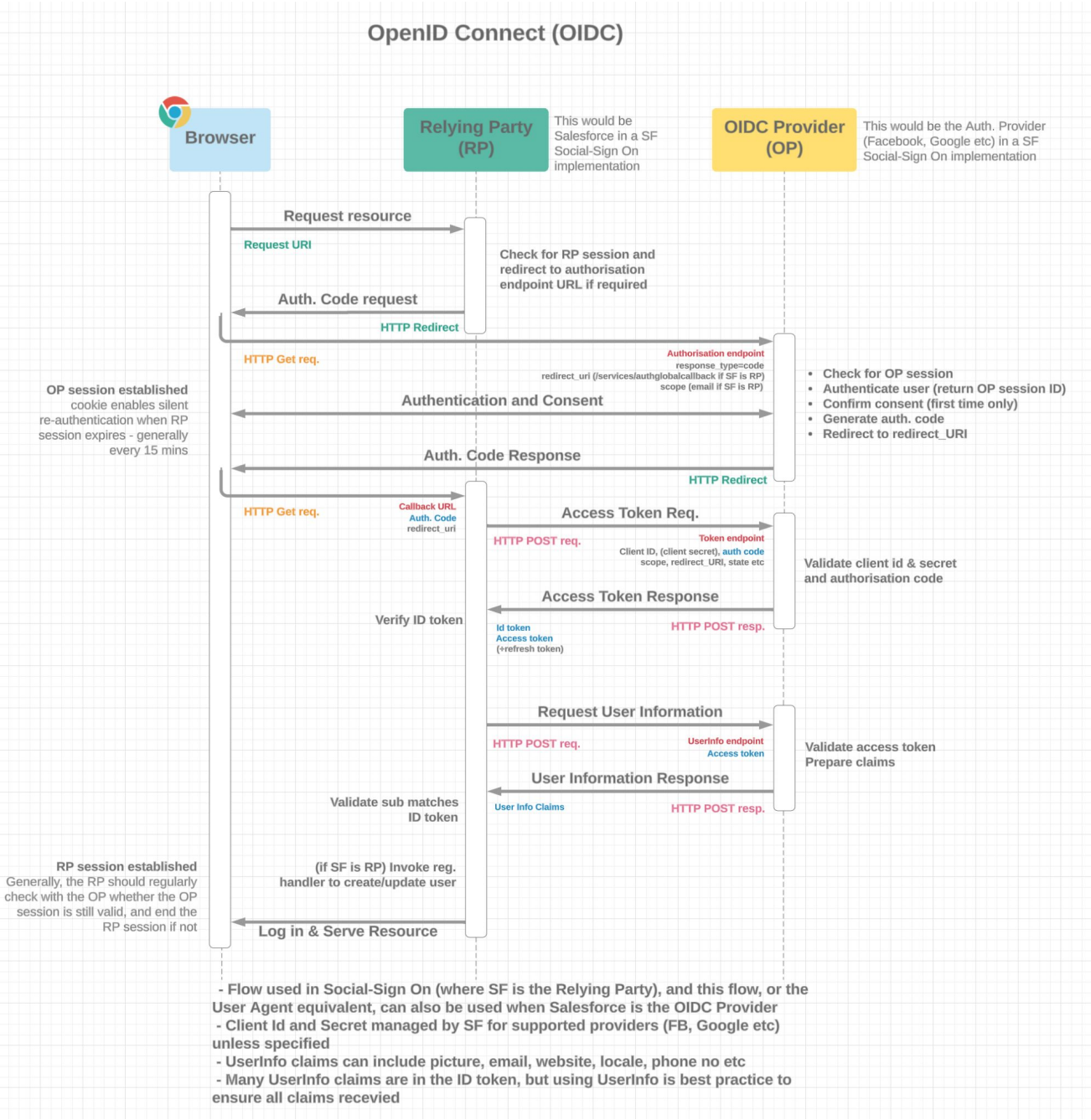
DevOps Diagram



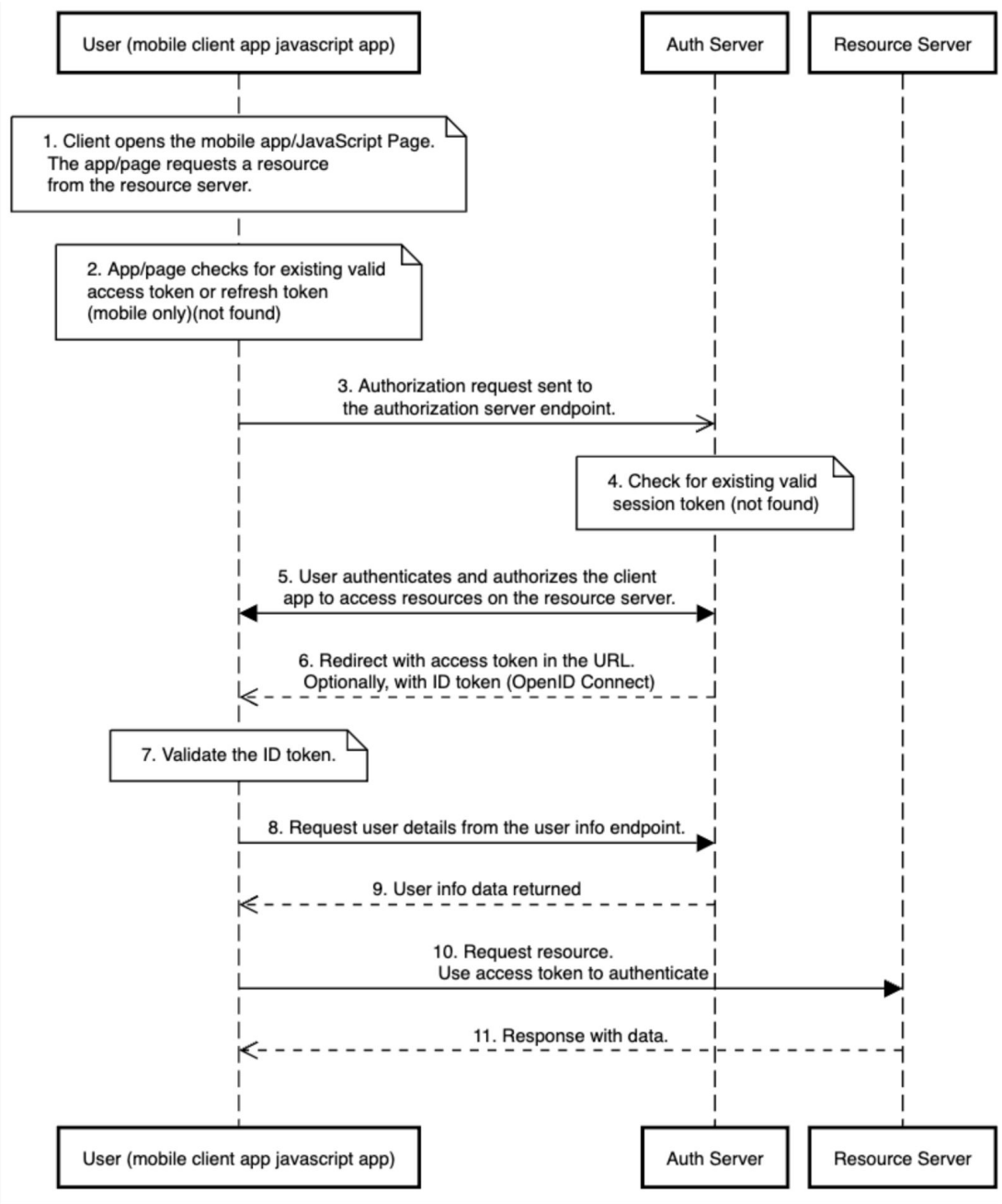
DevOps (paper)



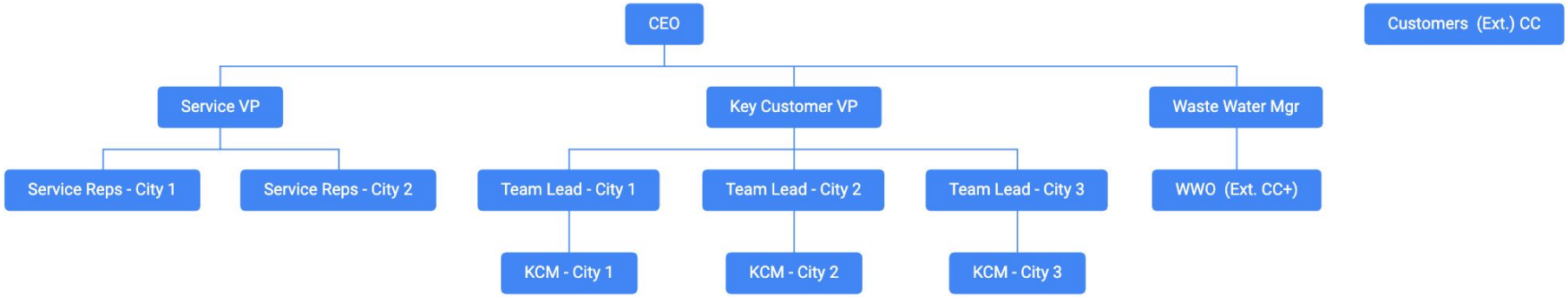
Identity Flows



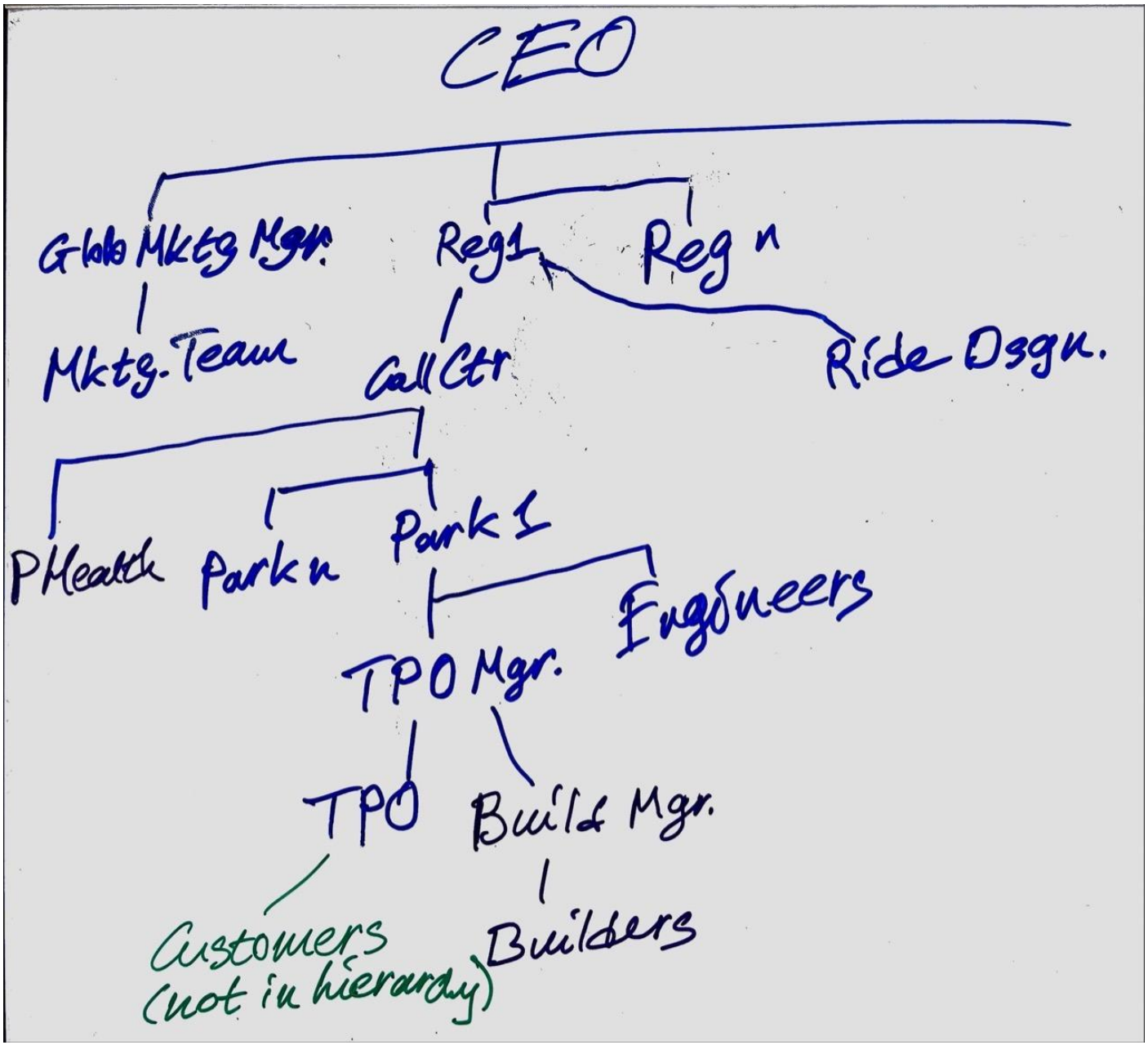
SequenceDiagram.org



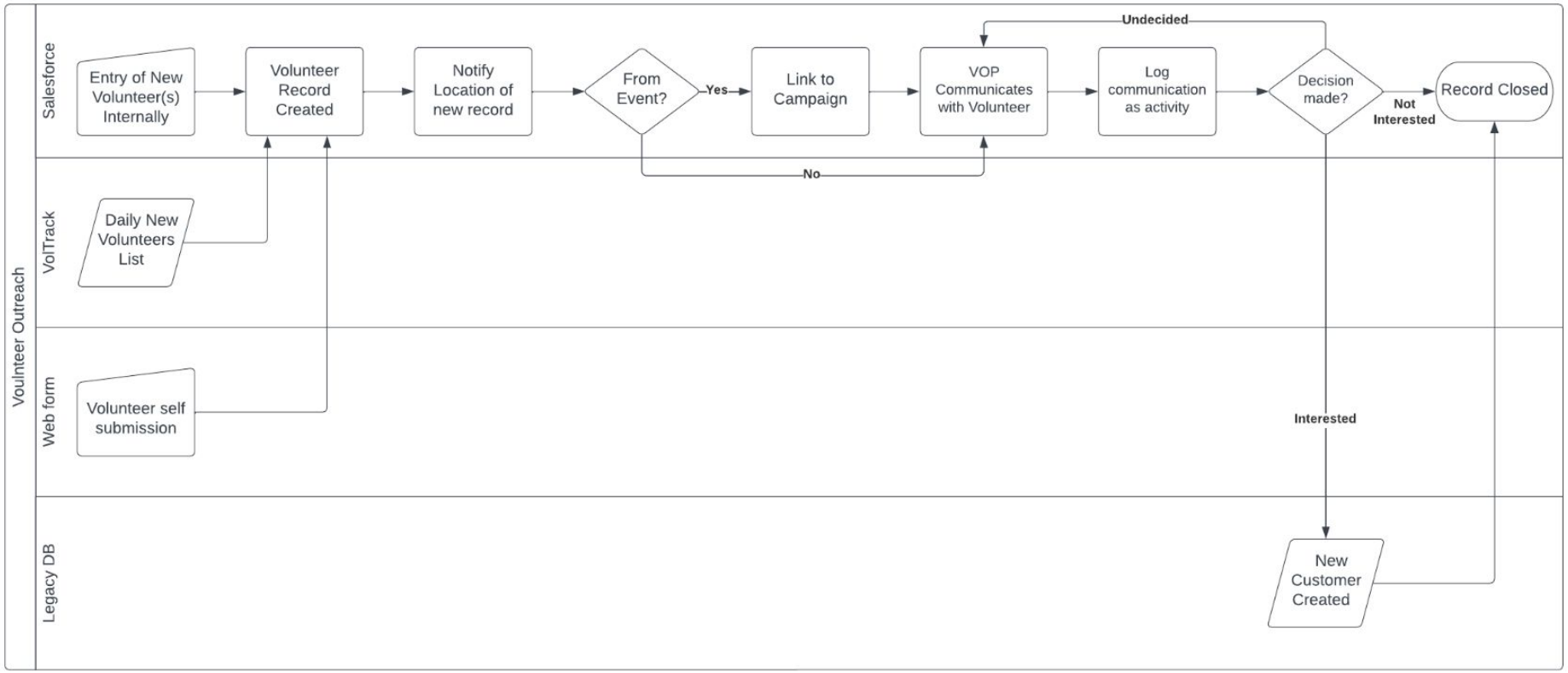
Role Hierarchy (Google Sheets)



Role Hierarchy (whiteboard)



Process Diagram (Swimlanes)



Integration Flow (swimlanes)

Person Search