

Defining Independent Org with Salesforce

Migrating existing shared salesforce to independent salesforce platform

OBJECTIVE

Our Customer was using a different company's Salesforce org. They recently purchased 2 Enterprise licenses for their own org. They require data migration and minimal customization of labels from old org to new org.

CHALLENGES

- The entirety of the data from the old org should be present in the new org that needs to be managed.
- After data migration, the new Org must contain the migrated data including Lead, Account, Contact Opportunity Documents, Activities, Report Dashboard Process builder, Workflow, Lightning layout, Profile, Email alerts, and Email templates.
- The entirety of the Contacts in the Excel spreadsheets must be present in the new Org.

APPROACH

- Data migration from spreadsheet to salesforce enterprise independent org with enterprise license preserving the contacts detail and related records details.
- Checking for duplicate records and checking sanity of the system.
- Providing customization on label level for object records.
- Clickdeploy.io for metadata migration.
- Dataloader.io for uploading records.

BUSINESS BENEFITS

- Independent salesforce platform with identity and integrity for advance customization will be available with history of records preserved for running reports or audit.
- Under Leads, there will be a separate sub-section containing a predefined list of Leads, under the label "AlaSHE"..
- Under Leads, the word "Abstrakt" will be removed, and "CC" will be replacing the word "AMG"

INDUSTRY

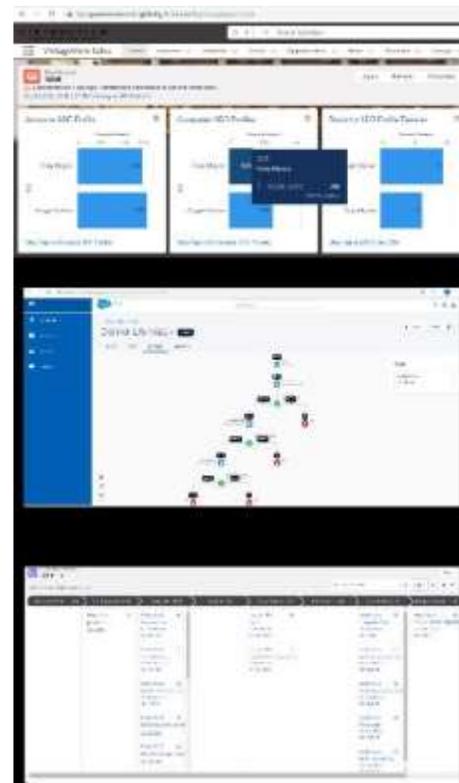
Commercial

CUSTOMER PROFILE

Champion Heating & Air Conditioning, Inc. DBA Champion Commercial HVAC is a commercial heating, air conditioning, and refrigeration contractor

TECHNOLOGY AND TOOLS

- Clickdeploy.io
- Dataloader.io



About CloudQ

CloudQ is one of the INC 5000 fastest-growing private companies based in Alpharetta, GA. We specialize in cloud-based technology implementation such as Salesforce. Our clients attribute us to our transparent, highly efficient and customer-centric business model. We are the Silver consulting partner for Cloud based Technology in Salesforce



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