Defining integrity and throughput with Salesforce
Enhancing implemented Salesforce through hierarchy
A Salesforce Migration Project

OBJECTIVE

Our Customer was already using salesforce classic with data on the scheduled and open parties with guest records, designs, sample sale and payment records and their related lists. The records were grouped under 3 profiles Artist-Original, Artist- New and President. President is the admin and other 2 profiles were the instructors. The roles were defined in their terminology but the access for both the types of user still exist the same utilizing higher Force.com-App subscription license version utilizing admin capabilities even for the instructors. The objective hence was to provide integrity and better user experience by introducing community plus licenses for the existing instructors and arrange their hierarchy below the salesforce admin user. Also migration from classic to lightning version of salesforce would increase the overall user experience.

CHALLENGES

➢ Lightning enabled and non-enabled components were there to migrate. Solution for the later was to develop.

➢ Concept of community pages for Artist- New and Artist- Original to be termed as community user from now when implemented in community user should have all the features community page enabled.

➢ Sharing rules to be defined for community user and admin. Community user needs to be defined with an access subset of admin user implementing integrity across the user data.

➢ Ruling out objects no longer needed in the system by preserving the historical data for tracking alone.

➢ Integration with 3rd party Pay pal app in test environment.

APPROACH

➢ Migration from classic to lightning preserving all the features existing and enabling features listing below.

➢ Implementation of SFDC with new community customer plus licenses for Truth Be Told Art can help in an Efficient and Proximal approach to manage the tracking of scheduled events.

➢ Better user experience with lightning mode and superior experience for admin will create the pre-set hierarchy in place.

➢ Rolling out objects with no relevance will create a healthier system.

➢ Historical data for objects cleaned will also be preserved.

➢ Features which are not enabled in lightning need to be custom built. We have utilized custom buttons and URL mapping as a solution mostly.

➢ Community page also need solutions for some features not supported in community page. This is also implemented with custom buttons and URL mapping as a solution mostly.

BUSINESS BENEFITS

➢ Managed budget with cutting down of license providing essential features to community users.

➢ Supreme experience and managed experience for admin over the community users with access across the user data for managing the schedules, review and reflect.
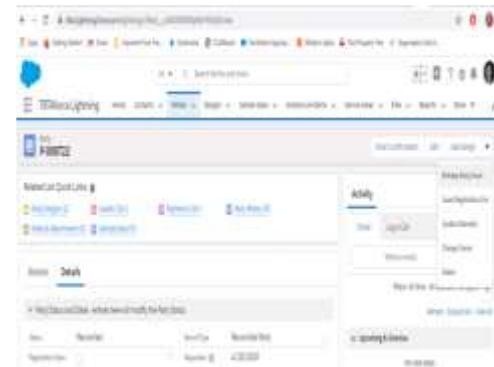
INDUSTRY

RETAIL

CUSTOMER PROFILE

Truth Be Told Art, an US-church based retail enterprise having years of experience in conducting theme paint parties by providing instructors to guide

TECHNOLOGY AND TOOLS

- Data Migration
- Sales Cloud
- Lightning Platform
- Paypal Integration
- Community Enabled Custom Features