

# Salesforce Sales Cloud Custom Development Using Apex & Visual force

## Executive Summary

The client firm contracting work to another firm was a double-challenge for them. FiDigital's immense experience in Salesforce cloud implementation solutions helped establish the initial trust level. This was well supported by the different business engagement models FiDigital proposed to the client firm. Our developers worked on each of the requirement provided by the client team and provided a best feasible solution what later became a long and healthy relationship amounting on fully satisfied Salesforce sales cloud custom development solution, crucial to the success of the client firm.

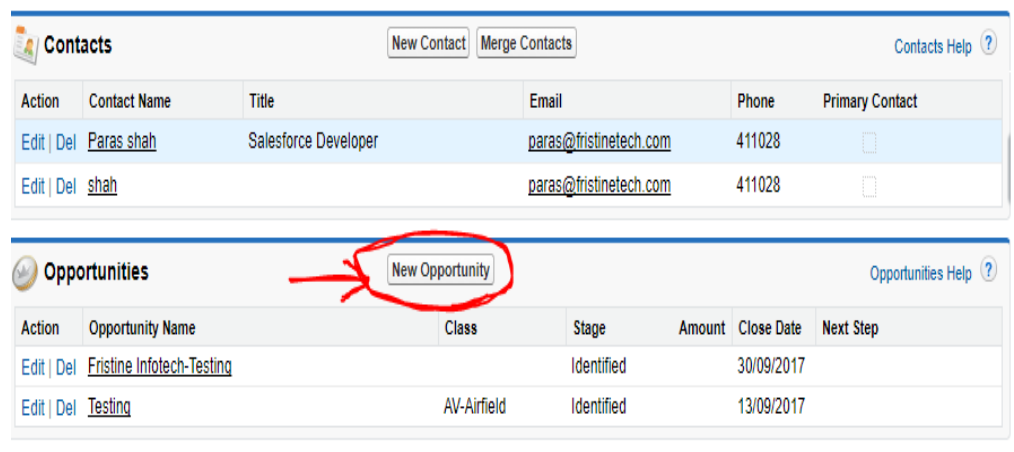


## About our Client

**Client** Sealite Pty Ltd | **Location** Victoria, Australia | **Industry** Manufacturing

## Business Situation

Sealite was not satisfied with the previous approach used for new record creation in Salesforce standard objects like account, contact, opportunity, and quote from a detail page layout using related list buttons as show in the image and since they also wanted to reduce the manual entries during record creation as every time they have to fill all the fields even



**Contacts**

Action	Contact Name	Title	Email	Phone	Primary Contact
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Paras shah</a>	Salesforce Developer	<a href="mailto:paras@fristinetech.com">paras@fristinetech.com</a>	411028	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">shah</a>		<a href="mailto:paras@fristinetech.com">paras@fristinetech.com</a>	411028	<input type="checkbox"/>

**Opportunities**

Action	Opportunity Name	Class	Stage	Amount	Close Date	Next Step
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Fristine Infotech-Testing</a>		Identified		30/09/2017	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Testing</a>	AV-Airfield	Identified		13/09/2017	

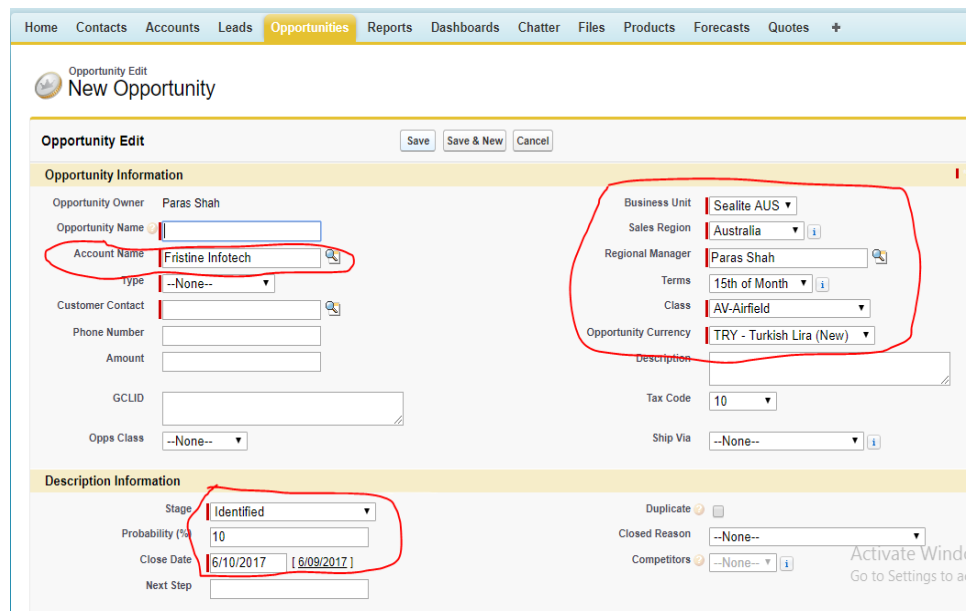
though they are common between parent standard object and child object. So they wanted a reliable solution which can automate the process within the standard object.

FiDigital offered its services and Claimed client's confidence showing expertise in related domain and technical areas, as well as the remote work protocol. Initial discussions were held on shared development, establishing point of contacts, communication and collaboration plans and arrangements, prior experience and success FiDigital Solutions Case Study commitments/guarantees.

## Solution Details

### The FiDigital Solution

A powerful customize solution was built on required process automation and has been configured successfully supporting the following use cases for auto-populating the fields from parent object to child object. We created a high end process automation for auto-populating the fields from object A to object B using the related list button on click event as highlighted in the image. We have customize this process in below objects to meet there use cases.



- ✓ Auto-populate fields from Account -To- Opportunity
- ✓ Auto-populate fields from Account -To- Contact
- ✓ Auto-populate fields from Contact -To- Opportunity
- ✓ Auto-populate fields from Opportunity -To- Quote

### Technologies

- ✓ Apex (cloud computing language)
- ✓ Visual force
- ✓ Salesforce CRM platform
- ✓ SOQL

## Methodologies

Due to the remote development nature of the project, we and the client came to conclusion that we will be following spiral/iterative model of software engineering for the development. By following these principles we will be releasing the builds for our internal testing and at the same time regular uploads to client team for reviewing the current development work as well as suggests/requests new changes before the final release. By using this methodology client can review the working of the product in actual environment much before the final release and can make a change request/new feature during the development phase itself without compromising on the final delivery date.

Apart from regular core software engineering principles, we also follow:

- ✓ Development document
- ✓ Coding discipline document
- ✓ Code reviews
- ✓ Configuration management

To support this methodology FiDigital configured the following process into Salesforce platform sandboxes.

- ✓ Development
- ✓ Testing
- ✓ Staging
- ✓ Production

## Results/Outcomes

After just a week of implementation below are the outcomes:

- ✓ Fully **automated process solution** in just a button click.
- ✓ **Reentry** reduced to about 50-60% and thus, reducing the timeframe in record creation.
- ✓ **Faster** process due to reduce in manual record creation.
- ✓ **Increased user adoption** from simplification of the user interface.
- ✓ **Increased user satisfaction** from improved security and implementation of best practices.

**Want to see these kinds of results for yourself? Give us a call today at +61(452) 215-292.**  
We're here to make Salesforce work for you.