



Enabling Students to Perform Better in Life with **Salesforce**

Challenge

- Facing issues with custom Visualforce page
- Same data entry in both Salesforce and ADP time-consuming and error prone.
- Had DocuSign subscription but was not being used
- Need for transitioning to Lightning

Idea

- Plan to use workflows and process builder to streamline various processes.
- Move to Lightning needs to be taken up in a big way with project calendars timelines and deliverables.

Our Solution

- Corrected the Visualforce production code to make the page load and perform as expected
- Integrated Salesforce and ADP using an AppExchange app for timesheet management - Timesheet by Upland
- Created workflows between DocuSign and Salesforce to help with its business process integration
- Helping with migration to Salesforce Lightning.
- Created Visualforce pages (with dynamic text and images) that can generate PDF for each donation.
- Simplified creation of task/tracking note records on multiple contacts using a new list view.
- Set up the process for sending out email alerts to the appropriate Executive Director of the region.

Client Background

- Organization providing high school students with meaningful youth and professional development training, paid internships, and one-on-one support
- Partners with schools, law firms, banks, energy companies, businesses, nonprofits, financial institutions, tech firms and more, with an aim to prepare high-schoolers for self-sufficiency

Business Benefits

- Transition to Lightning made the processes streamlined with the data and visually easy to navigate.
- Improved Salesforce performance issues by rearranging the apex code.

About CloudChillies

CloudChillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. We have years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Lightning platform development.

We assess your needs to provide maximum value through IT to increase your impact and achieve your mission.

 CloudChillies



✉ Email : info@cloudchillies.com | www.CloudChillies.com

📞 USA : +1-732-733-6991 | Australia : +61-261-452-397

India : +91-731-2927999



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