



Simplifying Data Management and Storage on Salesforce

Challenge

- Events and closed tasks for which due date is more than 365 days archived automatically. Auto archival of activity records made them unavailable in reports, list views, and search.
- Export / Bulk delete of old tasks needed to free up space and release limits.
- Currently data exported / deleted manually (making it cumbersome) and not readily accessible for all users and management/administrator in custom queries.
- Backing up of information made retrieval, reporting and compliance difficult.

Idea

- Create a solution to automatically archive all tasks over 14 months old.
- Solution to allow easy and active data access.

Our Solution

- Use Big Objects to store and manage massive amounts of data on the Salesforce platform.
- Tasks over 14 months old inserted into Big Objects and deleted henceforth.
- Review past details of a record (Lead or Account) with click of a button 'Show Archived Tasks'.
- Simplified auditing and tracking long-term view of users and their Salesforce usage.

Client Background

- Australia based licensed financial services company providing tailored financial plans including financial planning, accounting & taxation, risk, equities, superannuation, finance and property.

Business Benefits

- Freed org archived data space.
- Achieved consistent performance irrespective of the data size.
- Analysis and reporting made easy, as was compliance.
- Optimized performance of core Salesforce platform and other applications.

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.

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