



## Simplified and streamlined the data entry process for a Wealth Management firm

### Challenge

- Used multiple conga templates for gathering information from the clients
- Had separate forms for the various purposes and were disconnected from each other

### Our Solution

- Converted an extensive form into a custom dynamic visualforce page
- Delivered and deployed the form onto the public internet for all web customers to interact with
- Added both static content and dynamic content driven by associated logic and data
- Form had Personal, Professional and Financial information such as insurances, loans, liabilities
- Directly linked the information with Salesforce and was updated into the users account and related object records

### Benefits

- Eased the process of customers' data entry for employees with no Salesforce license
- Customer need not provide details multiple times

### Client Background

Established 30 years ago in 1980 with the mission of helping clients to achieve their life goals and become financially empowered

Support and guide clients with retirement planning and living well, investment advice and strategies, manage and establish SMSF, and insurance and financial planning.

## 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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