

Salesforce Data Migration & Custom Field App

Turning 15 years of paper invoices into a working Salesforce system for a water-treatment service business

Years

Of historical invoices
migrated to Salesforce

100%

Revenue history reconciled
to the penny

20+

Products normalized from
inconsistent descriptions

1000s

Of customer addresses
geocoded for field routing

The Challenge

This client's water-treatment service business ran entirely on paper invoices for over a decade. That history — every customer, every job, every dollar — lived only in a single spreadsheet, with no connection to their new Salesforce org. Customer records were duplicated, service descriptions were free-typed and inconsistent, and there was no way to see a customer's full service history in one place.

What I Did

1. **Rebuilt the data model around the property, not the person.** Water treatment equipment is installed at a house — people move, but the service history belongs to the address. I redesigned the Account structure accordingly, merged duplicate customer records left over from a prior import, and linked occupants as Contacts — so the business can finally see everything that's ever happened at a property, regardless of who lived there at the time.
2. **Turned thousands of inconsistent descriptions into a real product catalog.** Fifteen years of hand-typed service notes ("Softner Serv," "5 bags salt," "Pre carbon filter, post carbon filter"...) became a set of standardized products and services, each correctly priced by analyzing the actual historical invoice amounts — distinguishing, for example, a routine filter service from a full system install that used similar language.
3. **Migrated the full financial history — and proved it balanced.** Years of historical invoices came across as Salesforce Opportunities with itemized line items, reconciled so the total matched the original spreadsheet to the penny. Along the way, I caught and fixed a subtle Salesforce platform behavior that would have silently thrown off every invoice amount if left unaddressed.
4. **Solved a platform roadblock with a creative workaround.** The client's Salesforce edition didn't support building custom apps directly inside the platform — a real dead end for the mobile invoice-entry tool the team needed. Instead of a costly plan upgrade, I built a lightweight external web app that authenticates securely with Salesforce and writes directly into it, using the phone's GPS to automatically suggest the customer address a technician is standing in front of — turning a multi-minute paper process into a few taps.

The Result

The business now has a single source of truth: every historical job, every customer address, and every product/service type, all connected and reportable in Salesforce. Field technicians can log a new visit in under a minute from their phone, with the correct customer address suggested automatically — no more paper tickets waiting to be typed up back at the office.

Tools & skills: Salesforce (Sales Cloud, Bulk API, REST API), data migration & reconciliation, Python/ETL, OAuth 2.0, JavaScript, geolocation services.