Salesforce implementation for a leading indie publishing company

Suyati's extensive Salesforce expertise powers a smooth transition into the cloud.

www.suyati.com

The Client

A leading indie publishing company with self publishing imprints in over 6 countries worldwide.

The client needed certain applications moved onto the cloud. The crucial decision of opting for Salesforce.com was made based on its versatile functionality and cloud computing benefits.

The Challenge

The Client's current legacy system was not suited to adaptation to changing business scenarios. They needed a robust system, with better access to reliable data. The top client challenges were:

Managing author information: Like tax processing, services management, book order management, on-demand printing of books, and distribution to multiple global vendors

Integrating existing system: Multiple technologies like BizTalk, Ektron and Commerce Server, to Salesforce.com Instance, as well as their website

Keeping track of project details: Like paid service processing, royalty payments, and marketing & sales

Managing freelancers and affiliates

Integrating call centre/help line with the system: The call centre to help authors resolve purchase and other service related complaints needed to be seamlessly integrated

Automating complex workflows: For authors and publishers, ensuring that the system is resalable to other publishers/ imprints

The solution

The programming environment: For development, Suyati the MVC (Model View Controller) pattern was applied, using the inbuilt objects given by Salesforce. Here, the Model was implemented using SOQL, SOSL, and Schema Builder. The Controller was implemented using Apex Classes and Triggers, Apex Scheduling, WSDL to APEX, Batch Apex, and Governor. At the same time, the Views were implemented using Visual Force, Mobile Visual Force Pages, and Standard Layouts.

Also used were Metadata API, Eclipse IDE (Force.com IDE), Currency and Language Management, Managing multiple ORGs (sandbox, Pre – Production, Developer),Customer Portal and Partner Portal, Sales and Service Cloud, Salesforce Console Implementation (single window), and Salesforce CTI implementation (call centre).

The Security challenges & Force Objects: This was managed with Roles Based Security, User Security, Session Security, IP Based security, and Permission Sets objects of Salesforce. The inbuilt standard objects of Salesforce like CRM Objects and Validation Rules were also implemented efficiently.

The Business process automation: This was implemented with objects like Work Flows, Outbound Messaging, Tasks Scheduled, Time based work flow, Flows, Complex Approval Process, Chatter Posts, and CRON Jobs (apex based timed workflow jobs)

Reports: Reports were generated in the dashboard with analytical snapshots. The implementation was through dynamic report building and Custom Reports. For the Data Management with the application, we used the inbuilt objects of Salesforce for Import & Export, Backup Jobs, Data Loader, Mass Update and Delete.

Monitoring: The monitoring system was designed with Managing Debug Logs, Email Logs, Login History, Monitoring Apex jobs, Outbound Messages, Mass Email, Case Escalation, Entitlement Process, and Bulk Data Upload jobs

External Integration: All applications in the Salesforce cloud were externally integrated with Google Apps Integration, Microsoft Office, Outlook, and Publishing App to AppExchange. The Salesforce application was integrated with the Commerce Server and BizTalk Server for client application's data synchronization.

The results

Salesforce became the one stop repository for all business records in the publishing cycle – all information from lead generation to sales. Multiple interfaces through web services, make this enterprise solution work efficiently in the cloud.

- **Collaboration**: Among teams spread across the globe e.g. India, US, Cebu(Philippines) etc., through Salesforce. Chatter deployment revolutionized collaborative efforts for a manifold increase in productivity
- **Creation of Event-Observer Engine**: Specific actions that follow certain events help perform critical business needs - without developer interaction/intervention.
- **Work Item Engine**: . This automated model for business needs creates instances of Services. These have work item templates, and are assigned as Project Work Items for projects.
- **Data Parsing:** Specific data from the uploaded doc file is read to be used by the application.
- **Salesforce CTI:** This Integration of Salesforce with CTI telephony is for the customer care center, enabling easy resolution of issues, as well as increased sales.
- **Catalyst for client business model:** A re-salable platform built, that can be easily setup/ procured by similar brands at a low cost to effectively increase sales, service, and customer satisfaction.

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