

# SHASTA TEK - Case Studies

V 1.0

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# Multi Dwelling Unit – Sales Process

## Requirements

Client provides services to residential and commercial customers. Within the commercial sector, Client wishes to track the MDU (Multi-Dwelling Unit) opportunities through a newly defined sales process, utilizing Salesforce as a Sales Platform. Tracking of eligible leads, from it becoming an opportunity, to final fulfillment through the Salesforce application.

## Challenges

- The Account Executive collects the leads from various sources, validates the addresses as a manual process.
- Subsequent steps such as Evaluations, ROI Model evaluations, movement of leads to the opportunity stage, to initiating the typical sales process such as Proposal, Negotiate Price and Timelines, Contract creation, and final sign-off by legal, are all monitored through excel spreadsheets. So it involves a lot of coordination with the stakeholders to get the status updated and by the time updated sheets are circulated, the information is outdated.

## Technical Solution

### Multi Dwelling Unit - Sales Process

End to End implementation; Leads are captured and qualified and converted to Opportunity. The Opportunity goes through different level of stages till it is Closed Won/Lost. Implemented customized stages in the opportunity object over and above the standard stages.

- ✓ Advanced Apex programming was used for Salesforce Customization.
- ✓ Excel Application has been converted to Salesforce app as a ROI Evaluation tool which is used by the director for comparing and approving cost.
- ✓ This application has a customized data interface for quote creation followed by Contract Agreement process. **'Conga Contract'** is used to build the agreement for digital signature.
- ✓ Customization of Products and Price book. Customized Email Handler and communication with dynamic data capturing.
- ✓ Reading .txt file and processing into the Objects.
- ✓ Customized Email Handler and communication with dynamic data capturing.
- ✓ Customization of Products and Price book.
- ✓ Acquiring digital signature on the agreement documents from end users using **'Conga Contract'**.

## Benefit

- The sales process cycle time improved in a short span of time
- Standard functionalities were eliminated writing code up to 50%
- Visual flow and Process builder (Point and click methods) had replaced writing Triggers
- Development effort was minimized which had drastically removed the development effort and cost

## Equipment Pre-Qualification and Order Tracking

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### Requirements

Orders may include non-standard equipment's which has to undergo approval. To identify which opportunities require approval, a pre-qualification process is needed.

Gather the data from the customer to evaluate whether the order will include non-standard equipment's which require approval.

Also after post qualified, the orders need to be tracked to increase the sales.

### Challenges

A method for tracking all of the data and tasks is required from within salesforce to eliminate the manual tracking and allow for the real-time reporting of order status. The business requirements necessary to create an improved process flow within salesforce for these orders.

- Collect Data about current equipment system and provider
- Collect Data about new equipment system requirements
- Collect Data about Off-Net or Multi-Site Locations
- Collect Data about Customer Site Readiness

### Technical Solution

- ✓ A wizard based screens was designed to capture the survey data.
- ✓ Visual flow was used to develop the screens.
- ✓ This application was designed to use both in Desktop and Mobile device (IPad). Since the survey data will be captured on the remote location, the IPad screens are in such a way that data entering with an ease.
- ✓ Multi-level and Multiple approvals are arrived through the visual flow which will automatically replace the users when they are move out of the department, with a one step process.

### Benefits

This process will address the ability to evaluate a customer's requirements related to equipment's

- Ability to identify the customer's existing equipment features
- Ability to identify the customer's requested equipment features
- Ability to identify which features are non-standard and require approval
- Ability to obtain approvals from multiple departments
- Ability to create an addendum to be included with the agreement sent to the customer
- Ability for data from fields and objects to be used in other records within the opportunity

## Commercial Evaluation (EEval)

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### Requirement

The requirement was to determine a flow for Commercial evaluation process which involves various stages as approval, designing and selection of products. TechOps and Engineering Personnel's are responsible for selection of the products and completion of Commercial Evaluation process.

### Technical Solution

- ✓ In order to implement this flow, necessary custom objects and fields were created with appropriate relationships with each other. The Commercial Evaluation (EEval) was designed as a custom object.
- ✓ The EEval flow runs in two ways based on the sales channel. Process builder and workflow rules was used to separate the flow and make it work as required.
- ✓ Once the Commercial Eval record is approved, Auto creation of child records was worked out using process builder.
- ✓ Visualforce pages and Apex classes were written to list the products for the respective objects.
- ✓ TechOps and Engineering team will select the products from the displayed list and once all the desired products are selected; it will be passed on to the Engineering team to complete the rest of the process. Once they complete and validate, the Commercial Evaluation process will qualify the prospect for further proceedings.
- ✓ In order to provide proper access and security concerns, validation rules were implemented. Page layouts were created to show the contents based on the user permissions.

### Benefits

- Inline Visualforce pages provides a way to select the products from the same page rather than referring multiple excel sheets.
- Easily navigate between the related records and approval can be done on the same page.
- The visibility of data is taken care in Salesforce and data is highly secure.

## The Construction

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### Requirement

The main objective of this project is to automate the process from construction sales process to construction of networks across the regions to customers. The process flows from Preconstruction, Construction, Engineering and Post constructions.

### Challenges

- The system consists of both random and sequential process.
- The process is initiated by account executive and flows to the hierarchy roles (TechOps and Network teams).
- The expectation is to provide a systematic track for capturing the construction data with multiple service type provided and to prevent users from skipping any mandatory process.

The System has to be customized for Regional and LOB specific needs wherever essential for conducting business and to drive user adoption.

### Technical Solution

- ✓ Salesforce, Force.com, Apex, Visualforce.
- ✓ Configuration of Salesforce.com application to incorporate various standard functionality like Leads, Accounts, Contact, Campaign, Products and Opportunities.
- ✓ Creation and customization of various objects, fields, record types, Workflow and Approval Processes, Triggers, Controllers, Escalation rules, Assignment rules, Validation rules, sophisticated Visualforce Pages, Custom fields, Email Services, and Sharing rules were done as per business needs of the client.
- ✓ Implemented Conga Composer for on click Email templates (Word, PDF, Excel) for users to deliver across customers.
- ✓ Adobe Eco-sign is customized for receiving E-signature for Order Acknowledgement Email from customers and captured data is stored in salesforce.
- ✓ Implemented On click JavaScript validation to navigate and prevent users to skip tasks.
- ✓ Process builders are implemented for sequential update and prevented triggers for ease of development and deployment process.
- ✓ Implemented HTML, CSS and VF page for Emails alerts to customers and internal purposes.
- ✓ Einstein Wave analytics is imposed for visual representation of data across multiple Organizations in mobile view and Apps.

### Benefits

- Secure Force.com cloud server is used to capture data and prevent data lost.
- Ease of Server login and track complete information's from anywhere.
- The amount of customer data volume is growing exponentially every day, exploring data manually has become a bigger challenge, and data analytics has been achieved with Wave analytics.
- Wave analytics has been used for sales reps to increase the productivity and to increase the area of expansion.

#### CASE STUDIES - SALESFORCE

- Invoice and Order Acknowledgement to customers has always been a challenge and it is achieved on button click by Conga composer and Adobe eco-sign.
- Sequential process with delays are handled with batch Apex and records are updated on schedule basis.
- Customer is now able to better forecast the billing projections based on predictable completion dates.

## The Single Sign On

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### Requirement

The Client is having multiple production boxes and the corporate users are having access to all the production Organizations (Org). There needs to be a mechanism that corporate users should be using that for switching over from one Org to another Org without logging into multiple times.

### Technical Solution

- ✓ Single Sign-On (SSO) technology allows users to authenticate at a single Organization, with a single set of credentials, with that users can access multiple Orgs.
- ✓ When a user attempts to access an Org, and authentication is required, rather than prompting the user for authentication directly, the Org redirects the user to the Identity Provider. Once the Identity Provider has authenticated the user, it sends the user back to the requested Org, which automatically grants access to the user based upon previously established trust between the Orgs and the Identity Provider.
- ✓ Using this technique, the user can easily move from Org to Org; as authentication in a new Org is required, the process of redirecting to the Identity Provider is repeated. Since the Identity Provider can maintain a centralized session for the user, each time this occurs, it eliminated the necessity for the user to re-authenticate. The result is a seamless single sign-on experience for the user, resulting in faster and simpler access to all their resources.
- ✓ We have enabled the Identity Provider, implemented the Self-Signed Certificate from the IDP Org and Configured SAML in the first Service Provider Org. Federation ID is one of the key settings to identify the users in all the Orgs.

### Benefit

- Single sign-on (SSO) lets the users to access authorized network resources with one login.
- Saves time and avoid memorizing and juggling with multiple credentials.

## Salesforce Integration with MS-SQL Server

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### Requirement

The scope of this project is to integrate Salesforce and MS SQL Server database. In Salesforce, client maintaining their Customer and Sales data. In SQL Server database, they maintain an entire transactions and finance information. Requirement is to integrate the daily transactions of the customer information from SQL server database into Salesforce. And it needs to happen in a near real-time with sufficient mechanism in place to auto detect the data existence before integration begin.

### Technical Solution

1. Since there is no direct relationship between Salesforce Data and SQL Server Database, we have related the two datasets using the house key numbers as a reference key.
2. After that, our technical team have created a scheduled batch process using Salesforce CLIQ process to perform the import and export data in Salesforce.
3. And, developed a.net application to fetch the data from SQL Server.
4. Written a compare module to analyze the both dataset and update accordingly into Salesforce.
5. Deployed the console application using Windows scheduler as a scheduled batch process at 1-hour regular intervals to achieve the near real-time.

### Benefit

1. Eliminating the manual sync and entries in Salesforce.
2. Ease of the automation, reduced man power and time consumption.
3. Regulated the integration on the scheduled time and monitoring the transactions.
4. On completing the schedule, trigger an email with success message and the file attachment with the transaction details as new records, updated records details for a part of auditing.



## Budgeting in Salesforce

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### Requirement

To implement the Budgeting Trends with the Actual Sales. Actual Budgeting Finance team was living in the Excel sheets. We have to import the excel data into the custom object as a data set. In the custom object, we have to create some of the customized calculation fields to accommodate the budgeting calculations. After that, we have to populate data from various objects Opportunities, Accounts, and generate reports and dashboards combining both datasets. The reports and dashboard will provide the insights and accurate data to the top management.

### Technical Solution

1. Used Apex Data loader to import data from the Excel.
2. Created a customized formula fields in the custom object.
3. Developed various type of reports (Summary, Matrix and Joint Reports).
4. Implemented Various dashboards (Bar, Gauge, Funnel, Donut Charts) with reporting metrics.
5. Plus, we customized the process, once upload the file into Salesforce object, all the customized calculations done dynamically within the Salesforce object. Just click of the “Refresh” button in report and dashboard will fetch the current data.

### Benefit

1. Analyze the data set and can take necessity decision at ease.
2. Eliminated the complex reporting with dynamic reports and dashboards.
3. Eliminated manual reporting effort and time.

## Forecast Budget based on the Sales Trends

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### Requirement

Need to create reports based on the Sales Trends in Salesforce with the various sales channels (Inbound, Outbound, Agents), Business Type (Residential, SMB and Enterprises) with forecast and display the budget for the decision makers.

### Approach

We have taken the customer account information and sales information from Opportunity data which had the Amount and Subscription duration. To get the Net New Revenue (NNR) value we have created the calculation field and applied a logic.

Generated the opportunity data revenue information per each channel and business types for the last eight weeks based on the Sales Grouping.

Based on the above criteria, developed the report and able to identify the revenue details with various filters and groupings.

Addition to this report, we have segregated the opportunity stages by grouping to determine how the opportunities are laid in each stage grouping.

### Technical Solution

1. Created customized formula fields.
2. Created Sales grouping by bucketing the opportunity stages.
3. Generated various type of reports (Summary, Matrix and Joint Reports).
4. Generated Various dashboards (Bar, Gauge, Funnel, Donut Charts).
5. Scheduled Report generation and email the report to users.

### Benefits

1. Make decision on the budget spend for the Sales Channel and Business types.
2. Using this report, they were able to increase the sales revenue and close the deal as earlier.
3. Using this to determine where in, which channel or stage group opportunities are getting lost.
4. For Non Salesforce users, we kept sending the downloaded report through email to avoid the license cost for very limited users

## Einstein Analytics (Wave Analytics)

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### Requirement

A request to create high visibility dashboards using external source data as well and combine the data within the Salesforce system. Client would like to drive the dashboard based on the various metrics according to that dashboard and need to deliver the result.

Possible ways to use the Wave analytics:

1. Loading Salesforce Data with the Dataset Builder and the Dataflow
2. Trending Salesforce Data in Analytics
3. Connect to Salesforce and External Data with Data Sync and Connections
4. Load External Data from CSV and Microsoft® Excel

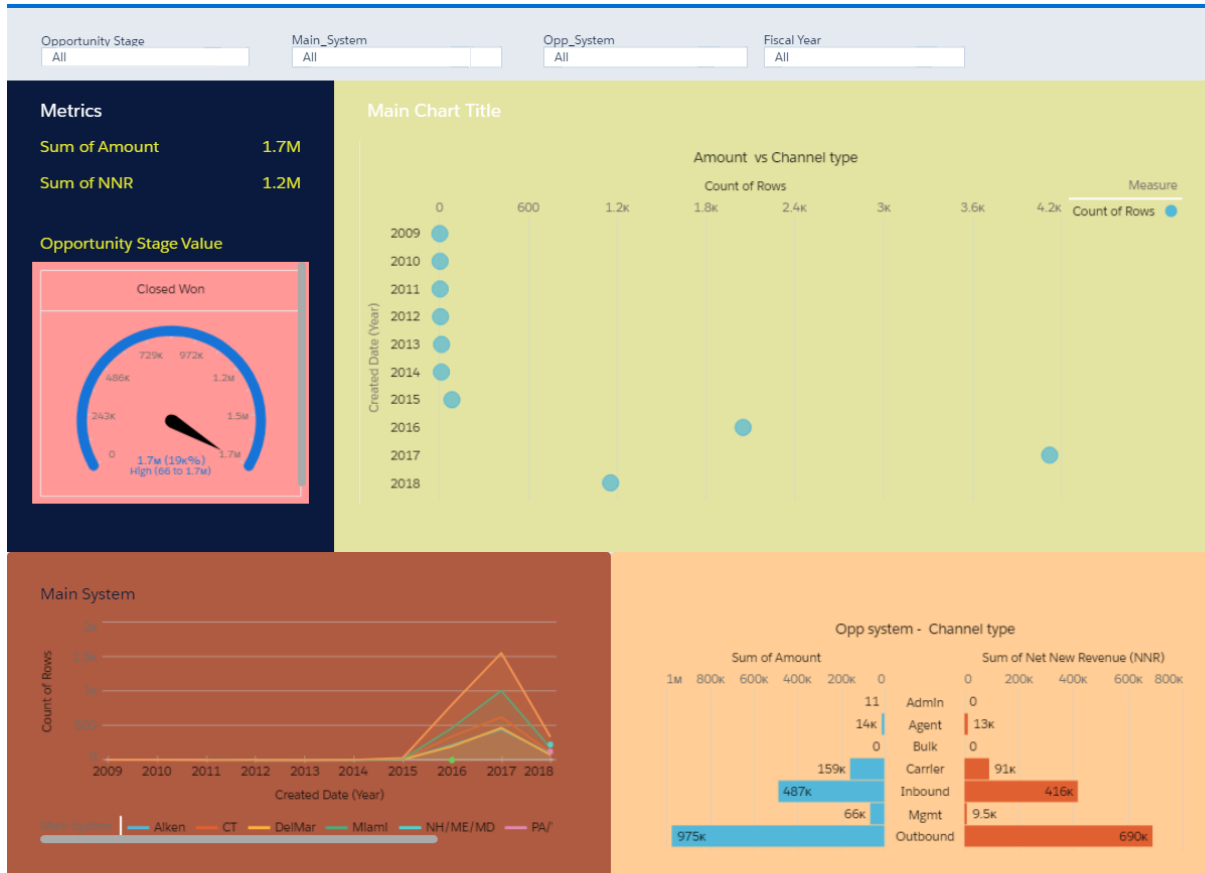
### Advantages of Einstein Analytics over Reports and Dashboards

- R&D in Salesforce can process a moderate amount of data, but it definitely is not suited to processing millions of rows.
- Main attractions of the Analytics Cloud and other BI tools is the speed they can process large amounts of data.
- It can grab data from external systems like CSV, informatica and even from Salesforce CRM unlike Reports and Dashboards.
- With standard reports and dashboards, we can analyze up to three objects. With Wave Analytics, we can get an interactive analytics on an unlimited number of objects (Cross Object Analysis).
- R&D can only hold historically report on data over 90 days, and the graphs and visual representations of data is far superior in the Analytics Cloud.
- Sort and Drill into any particular data using Explore option.
- Can set notifications and annotate any widgets in the dashboard. For each widget on the dashboard, we can comment to share with others your thoughts about the results it shows using annotate.
- Enable or disable downloading from analytics.
- Can share dashboards with others within the organization.

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### Sample Einstein Analytics Screenshots:

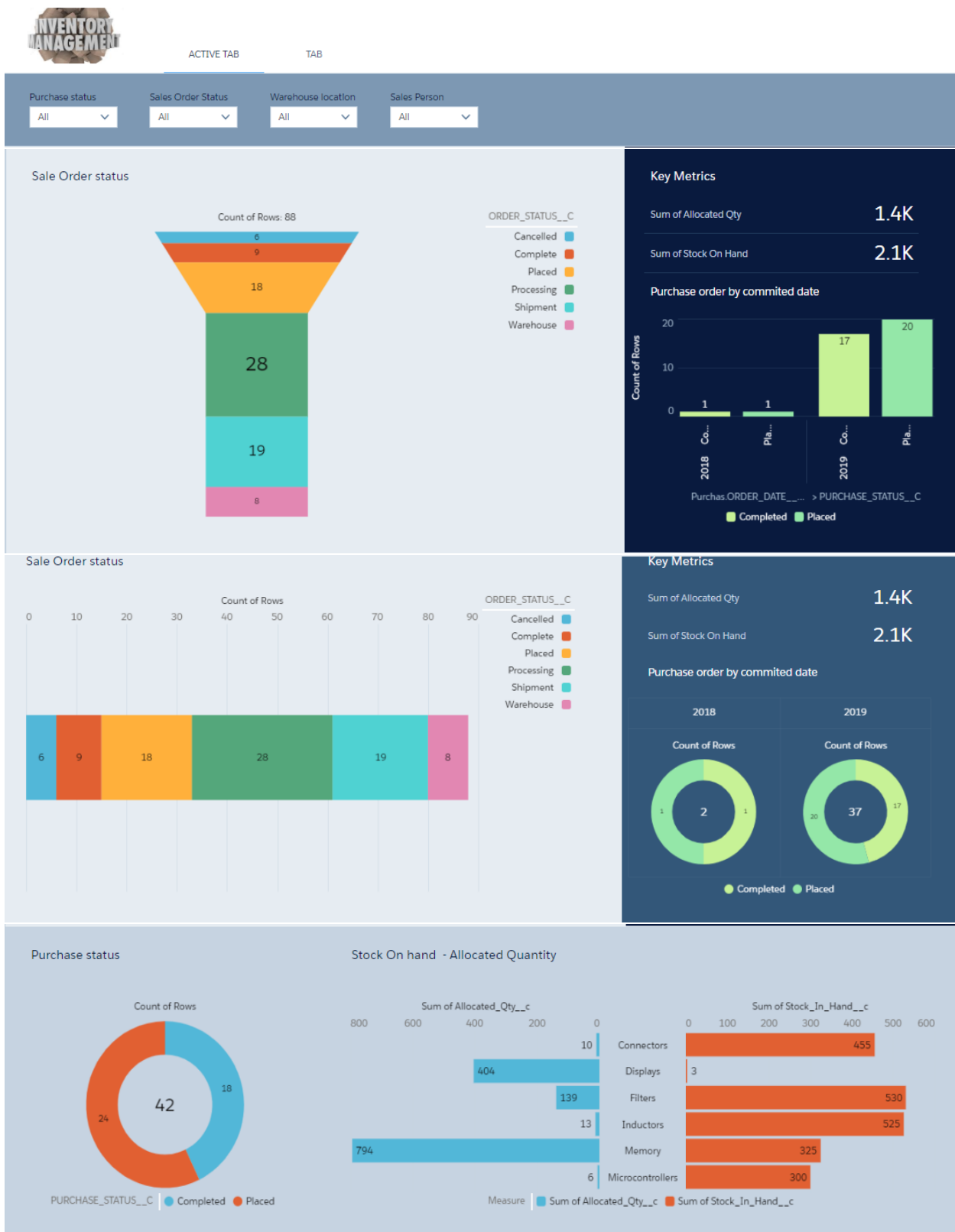
#### Opportunity Data



#### Details Data Table

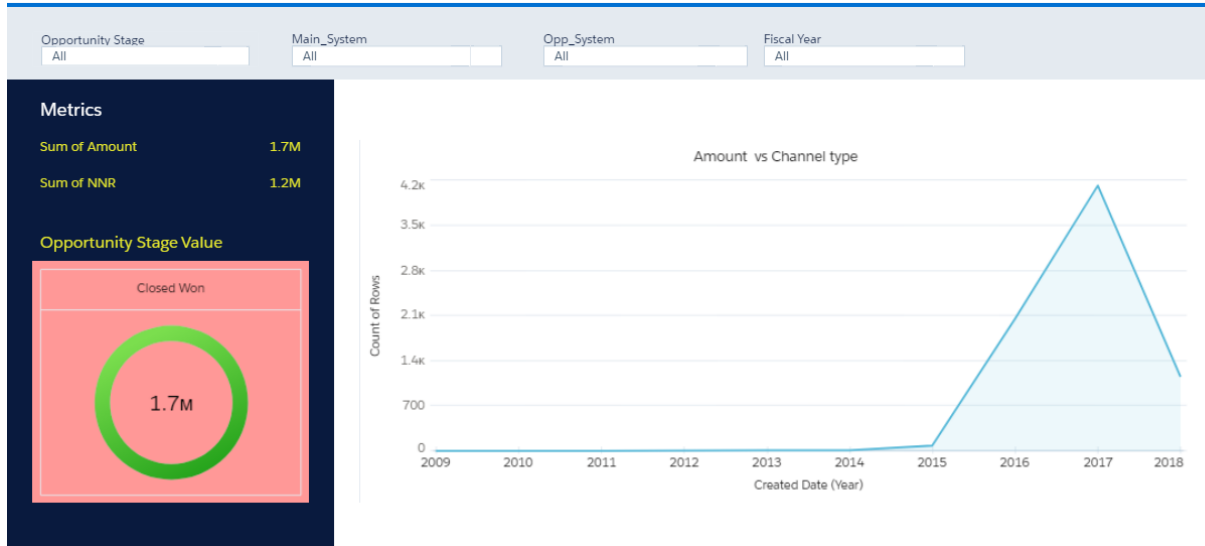
#	Opportunity Name	Record Type Short Name	Opportunity Owner	Transport Type	Opp System	Net New Revenue (NNR)	year	Amount	Fiscal Year
1	Cresaptown Dental LLC TV/	Video, HSD	Brad Schario	Coax	Cumberland, MD	169.56	2,017	169.56	2,017
2	Rainbow Tire & Supply	Video, Internet, Phone	Chuck Burkhard	Coax	Kingwood, WV	121.84	2,017	239.78	2,017
3	Rene Perez and Associates	Video	Marcus McCormick	Coax	Miami, FL	74.99	2,017	74.99	2,017
4	Ronald W Shane Center-loy	Video, Internet, Phone	Trish Horvath	Coax	Miami, FL	-20	2,017	89.97	2,017
5	Patricia Kodym - HSD	HSD	Debra Botelho	Coax	CT	79.98	2,017	79.98	2,017
6	Healthcall Med-	Hosted Voice	Allisa Young	Fiber	CT	318.96	2,017	449.88	2,017
7	Hager Clinic HSD	HSD	Jim Grove	Coax	CT	90.98	2,017	90.98	2,017
8	Seneca Nation of Indians	Video, HSD	Jim Grove	Coax	Salamanca, NY	109.78	2,017	109.21	2,017
9	Belt RambamInc DP	HSD & Phone	Jim Grove	Coax	Miami, FL	149.98	2,017	149.98	2,017

# CASE STUDIES - SALESFORCE

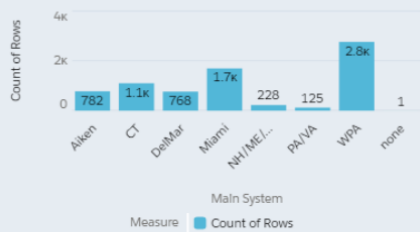


## CASE STUDIES - SALESFORCE

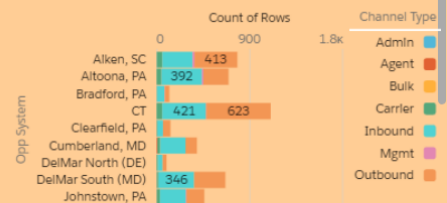
### Opportunity Data



#### Main System



#### Opp system - Channel type



#### Details Data Table

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