GOC Project Case Study

Project Title :- Apttus CPQ Implementation & Enhancement

Problem statement :-A leading education company is having technical education related products which they are selling it all over US and Canada region's school. They were already using sales logic which was desktop base system but now they are moving to web based system for which they have selected as CRM and for Configuration and pricing setup they selected Apttus CPQ but Apttus CPQ does not have functionality to associate product with Sites. Also there are certain other features that is missing in Apttus CPQ. To resolve this we did some enhancement in their Salesforce System with Apttus CPQ system.

Project Length :- 1.5 year

Our Role :- Our role was Apttus CPQ product Expert, Solution architect and developer.

Team Size :- 3

Challenges :-

1) Our first challenge was this project was already developed by some other consultants. So client actually given this to three other consultants before they gave us.
2) We started modifying other consultant's code and we found that it needs architecture changes.
3) They wanted to show 100000 records in page without pagination, which is technically not feasible, and salesforce is not allowing this using VF page.

4) While Developing solution we come across few governor limit issues such as Apex CPU time limit exceed, Scripting statement, Heap size issue, view state limit etc.

Solution :-

We provided solution by creating one VF page and several object's and associated those object with Apttus database object. We developed following feature in that page.

Key Functionalities:-

- Map multiple sites with multiple Products (Line item)
- Display 10000 Sites on single page using angular JS with 5000 each on one page.
- Filtering of 10000 sites based on Site, Term and Product on client side.
- Inline Quantity edit and Roll up to its Line item.
- Given shorting each column using angular JS.
- Expand and collapsible view of Product to see its associated Sites.
- Association Screen functionality
    - Can add up to 2500 sites into selected site.
    - Can search and display up to 15000 sites at a time.
    - Paging of 15000 record and displaying 500 per page.
    - Shorting of each column for same page on selected site section and search site section.
    - Can filter sites based on Account, Proposal Id, Enrollment, Status, SLXId, State etc.
    - Ability to drag and resize associate screen.

- Ability to associate 5000 site at a time.
- Ability to clear all selected site with single click and Show selected site which shows your existing selection.

Ability to remove all sites with single click

Ability to Validate 10000 record against Asset line item.

- Showing Overlap error if asset matches with the criteria given
- Showing renewal error if date is overriding.
- Showing Grade level Validation if grade is not matching with product.
- Shared Site validation
- Quantity validation if it is not matching with given quantity.

- Error information Screen building
  - Created Pop up screen which display when user click on error icon.
  - It is showing user detailed information about error and conflict record details.
  - Given Error correction suggestion text with record link so user can understand error details.
  - Given overlap record with which record is getting overlapped. Asset record and proposal record with link so user can cross check with current cart's line item
  - Export functionality to export all error conflict details to excel so that they van verify offline and come again to resolve those error.
- Copy Functionality

    - Given copy button on map site screen so that user can easily copy sites from 1 product to another product without going to associate screen.
- Remove Functionality
    - Given remove button to remove entire product with site and specific selected sites from the map site screen.
- Custom search functionality
    - Showing associated unique site on associate site screen with green mark.
    - Searching with 6 different fields using tabs.
    - Associating only 5000 records in single call and window will not close until user close it.

Benefits :-

After building this features they were able to improve their selling cycle and Quotation process faster than earlier.

Few snaps :-

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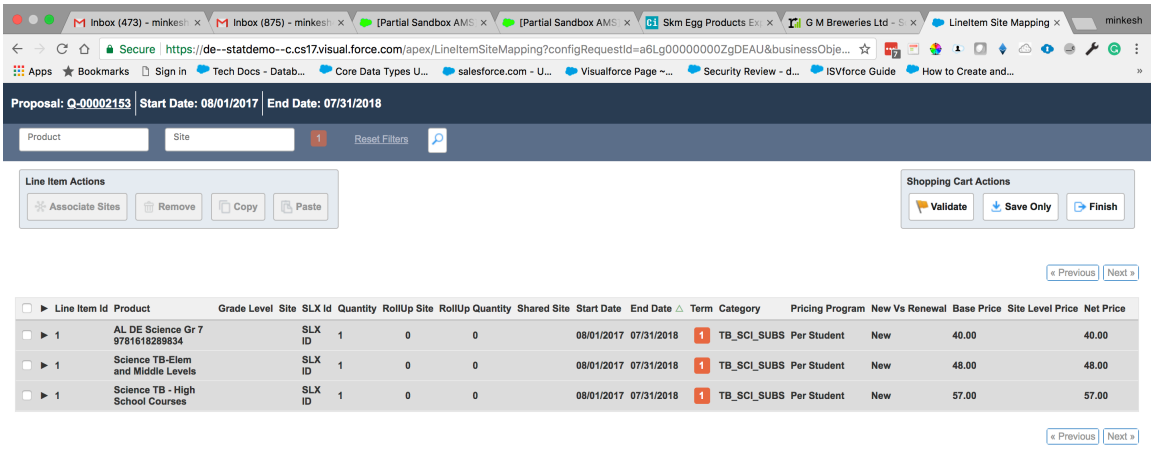

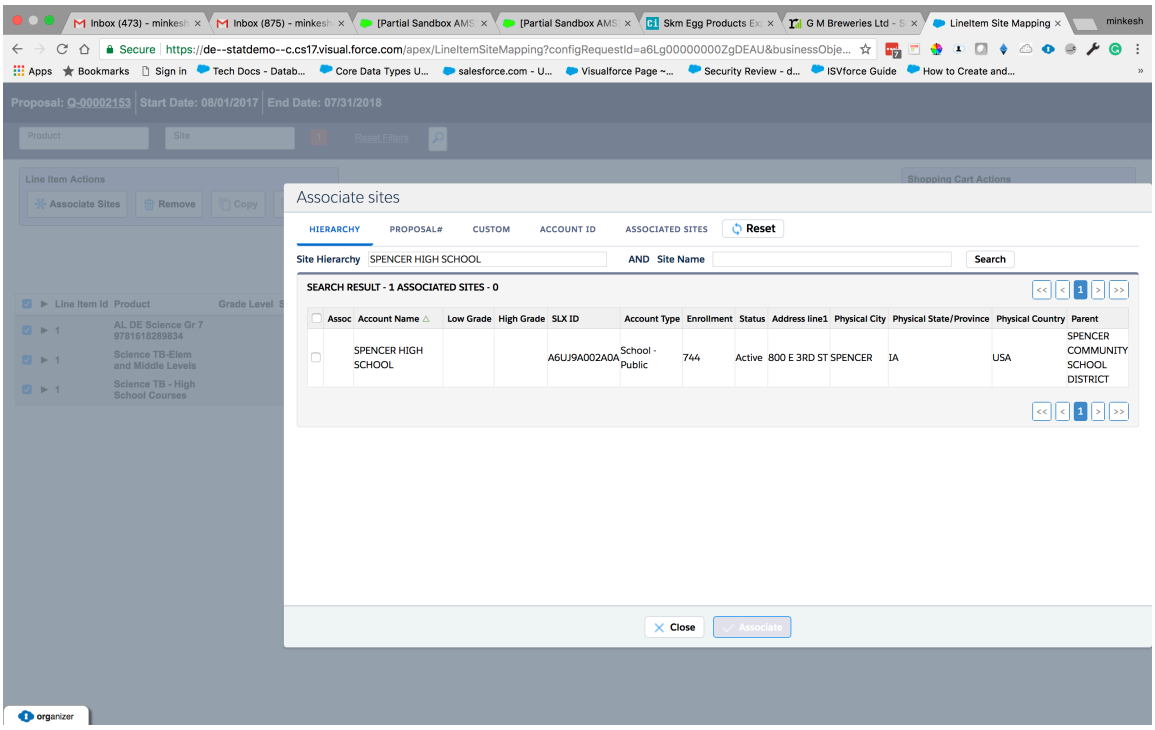

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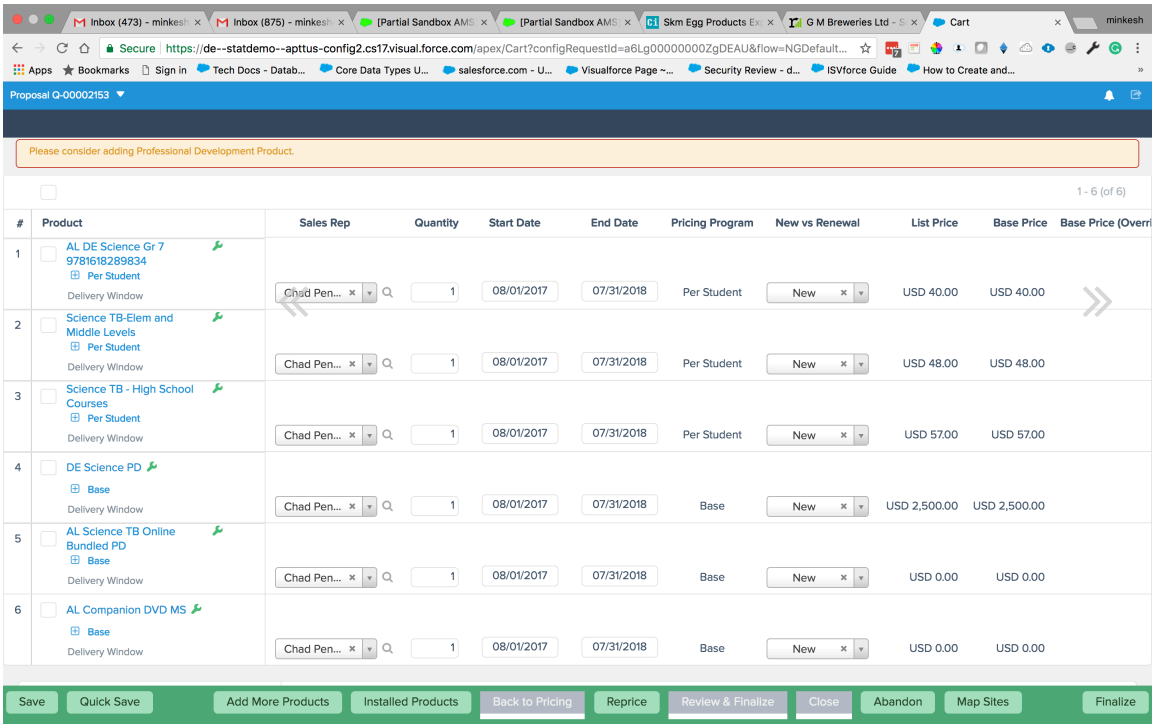

GOC Project Case Study

Project Title :- EMC (Reimbursement system)

Website :-https://www.mburse.com/

Problem statement :-

Client is providing expense management solution to its customers and he built php solution which was not robust and he moved to Salesforce Community.

Project Length :- On going

Our Role :- Our role was Business Analysis, Solution architect and developer.

Team Size :- 2

Challenges :-

1) Our first challenge was this project was already developed by some other consultants and they did not provide proper solution which was resulting into various bugs in the system.
2) Again we did reverse engineering of existing code written by previous consultant and found bugs.
3) No clear requirement/Document from client side to understand his need.
4) Client is non technical so we had to explain him and give him option and future pros and cons of solution which we propose.

5) Client was using third party system for fetching mileages.

Solution :-

Being Salesforce Expert, We first analyzed and interacted with client to understand his business and solution which was already developed but client was also not aware about the solution and feature which is already built. So we go through entire code and we clean up code and revamp code and fixed bugs. We gave him following features.

Key Functionalities :-

1) Integration with Triplog system to fetch mileages of particular driver of last month.
2) User Creation in Triplog from salesforce.
3) User deactivation from salesforce to Triplog.
4) Import new user using CSV file.
5) Provided button on Contact, Reimbursement and on Account to fetch mileages when needed.
6) Provided page to transfer mileage from one reimbursement month to another reimbursement month
7) Send summary email to manager for the driver who exceeded monthly mileage limit.
8) Written batch class to transfer unapproved record to next month.
9) Deactivation process of driver and his reimbursement payment.
10) Knowledge base module for community.

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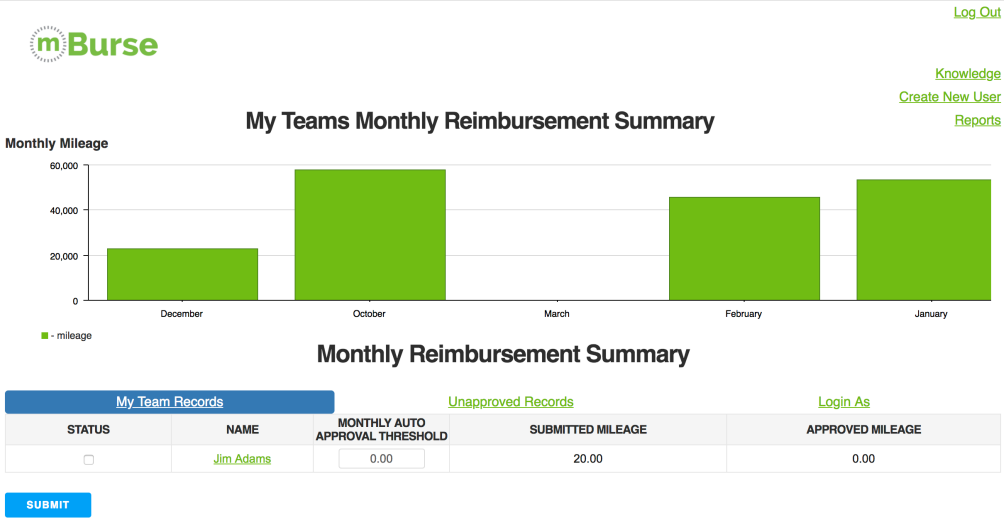
Benefits :-

Client is able to see improvement in their his system and able to deliver quick turn around services to his end customer.

Snaps :-



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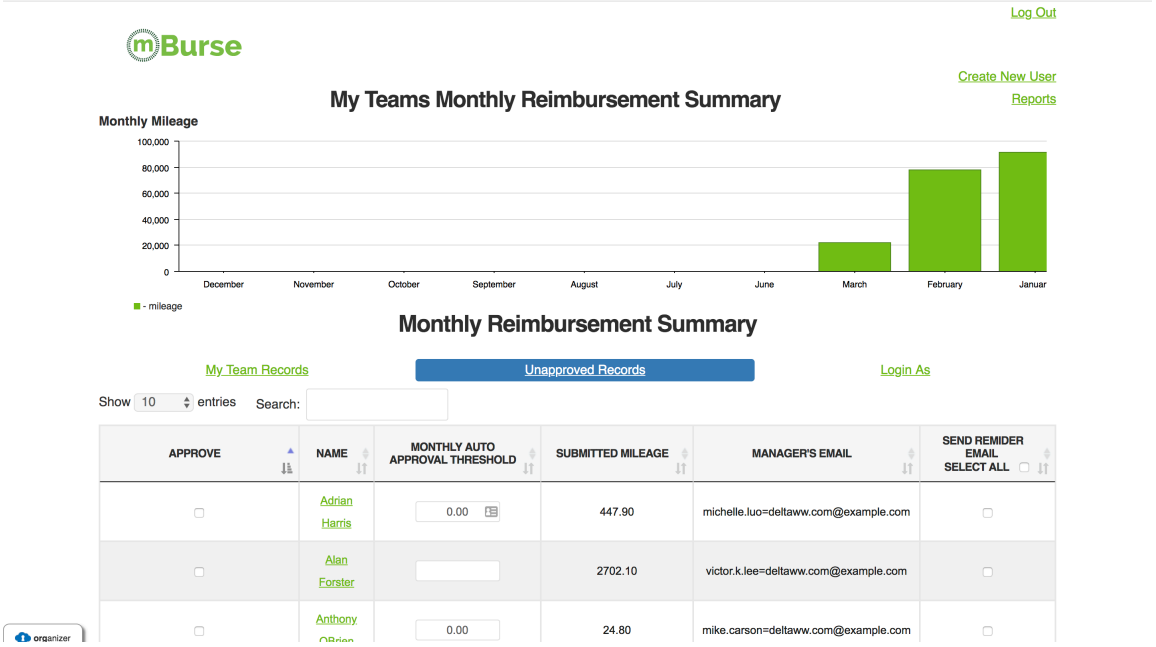

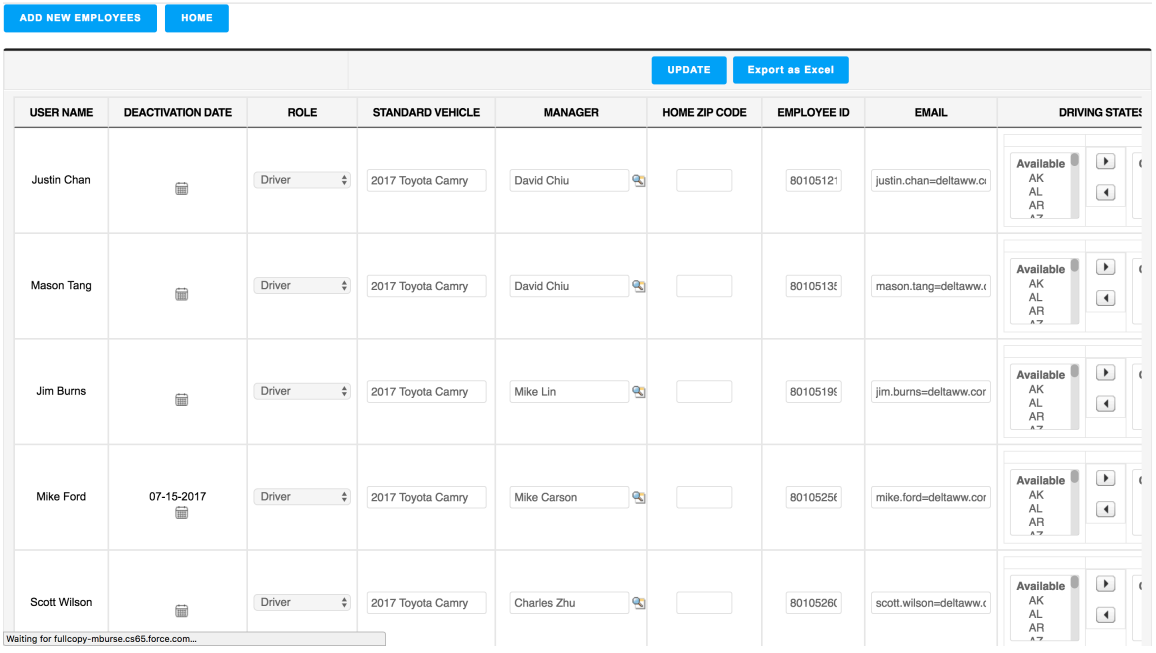

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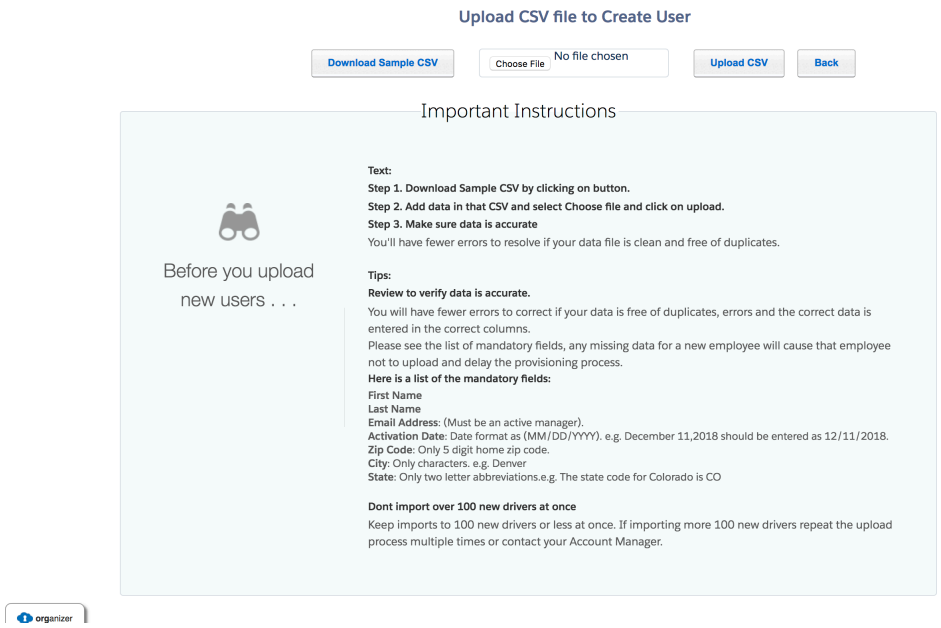

Project Title :- Video Interview Module

Website :- http://www.targetrecruit.net/

Problem Statement :- Client is having recruitment app on AppExchange and they wanted to include feature of video interview in their product for their existing customers.

Project Length :- 4 month

Our Role :- Our role was Business Analysis, Solution architect and developer.

GOC Project Case Study

Team Size :- 2

Challenges :-

1) Salesforce does not provide video capture feature.
2) Managed package code.
3) API for Video integration.

Solution: -

We have given solution to integrate with one .net based Xpertreview system which was having video interview feature. We have given following functionality to them.

Key Functionalities :-

1) Visualforce Page which opening through from job applicant.
2) Question selection from targetrecruitequestionbank and from xpertreview question bank.
3) View and review selected questions and Deletion of selected questions from selected list.
4) Interview time and date selection.
5) Email notification to candidate with link through which he can appear for video interview.
6) On Completion of video interview we provided Status in interview object.
7) Once Interview is completed Snapshots and video is available under interview record.

8) To view specific answer of specific question in video we have given feature to start video at that point.
9) Screenshot captured and saved in aws server whose link was available under Interview object.

Benefits :-

By this module this becomes one of the USP when compare to their competitors on salesforce.

GOC Project Case Study

Project Title :- Alex echo dot integration with Salesforce

Website :- http://www.targetrecruit.net/

Problem statement :- Alexa Echo dot integration with salesforce

Project Length :- 1 month

Our Role :- Our role was Business Analysis, Solution architect and developer.

Team Size :- 1

Solution :-

Please refer following video for demo of what we built.

https://www.youtube.com/watch?v=jp-sGOB7_78

GOC Project Case Study

Project Title :-EM Home (ClearResult)

Problem statement :-Implemented EM Home Software functionality to Salesforce, Added functionality for generating Contract and report from Online tool (Visualforce Page to create Energy Assessment Record) and from Records using Conga Composer.

Project Length :- 1.5 year

Our Role :- Our role was Business Analysis, Solution architect and developer.

Team Size: - 3

Challenges:-

1)Design word template with proper format and as data where dynamic using conga composer.
2) Capturing e-signature on generated document as conga composer not provide functionality for capturing signature.
3)fetch dynamic data from multiple object.

Solution:-

For capturing e-signature we have created visualforce component to capture signature and display it on document.

Key Functionalities:-

GOC Project Case Study

1) Visualforce Page which opening through from Energy Assessment or Other object which provide selection for document to be generated and can preview it. And can capture signature for that document.
2) Can generate multiple document on single click and download, capture signature and send merge document.

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Project Title :- Rollio Force

Problem statement :- In managed packaged for each object have different classes and different api calls for that we implemented comman classes and comman api.
For managed package we need to create versions and every time we need to create patch and versions for package.
Also, we have to generate the download url and released managed package.

Project Length :- 6 month

Our Role :- Our role was Business Analysis, Solution architect and developer

Team Size: - 3

Challenges:-

For all classes and API related we need to create single solution.

In JSON request body we need to change more customization related object and related API calls

Solution:-

For all classes and API related we need to create single schema related object and apex classes developed.

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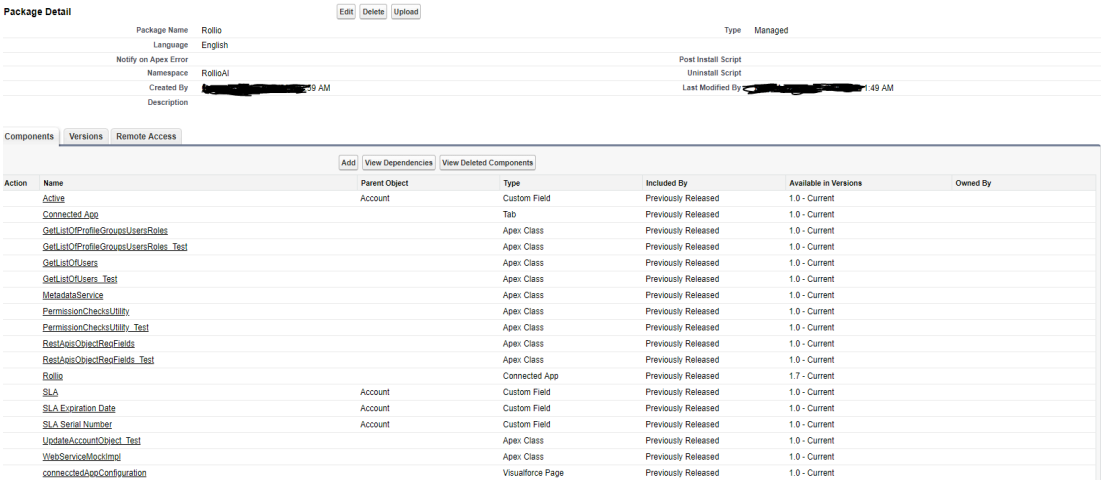
Key Functionalities:-

- Responsible for customizing Managed Package for upload the classes ,connects apps, custom field and other component which required in package.
- Also created connected apps for OAuth Policies.
- Responsible for migrating data from one Sandbox environment to another Sandbox environment and Sandbox environment to Production environment using Force.com IDE tool and Change Sets
- Responsible for writing Validation Rules in Salesforce
- Involved in writing SOQL, SOSL queries in Salesforce
- Responsible for writing Test Scripts for various scenarios
- Worked on Apex Triggers and Apex Classes for custom logic



Package Detail Edit Delete Upload

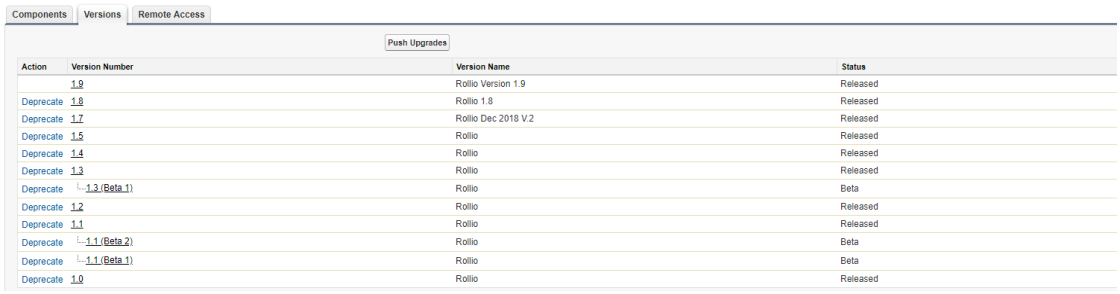
Package Name	Rollio	Type	Managed
Language	English		
Notify on Apex Error		Post Install Script	
Namespace	RollioAI	Uninstall Script	
Created By	[redacted]:49 AM	Last Modified By	[redacted]1:49 AM
Description			

Components | Versions | Remote Access

Add | View Dependencies | View Deleted Components

Action	Name	Parent Object	Type	Included By	Available in Versions	Owned By
	Active	Account	Custom Field	Previously Released	1.0 - Current	
	Connected App		Tab	Previously Released	1.0 - Current	
	GetListOfProfileGroupsUsersRoles		Apex Class	Previously Released	1.0 - Current	
	GetListOfProfileGroupsUsersRoles_Test		Apex Class	Previously Released	1.0 - Current	
	GetListOfUsers		Apex Class	Previously Released	1.0 - Current	
	GetListOfUsers_Test		Apex Class	Previously Released	1.0 - Current	
	MetadataService		Apex Class	Previously Released	1.0 - Current	
	PermissionChecksUtility		Apex Class	Previously Released	1.0 - Current	
	PermissionChecksUtility_Test		Apex Class	Previously Released	1.0 - Current	
	RestApisObjectRepFields		Apex Class	Previously Released	1.0 - Current	
	RestApisObjectRepFields_Test		Apex Class	Previously Released	1.0 - Current	
	Rollio		Connected App	Previously Released	1.7 - Current	
	SLA	Account	Custom Field	Previously Released	1.0 - Current	
	SLA Expiration Date	Account	Custom Field	Previously Released	1.0 - Current	
	SLA Serial Number	Account	Custom Field	Previously Released	1.0 - Current	
	UpdateAccountObject_Test		Apex Class	Previously Released	1.0 - Current	
	WebServiceMockImpl		Apex Class	Previously Released	1.0 - Current	
	connectedAppConfiguration		Visualforce Page	Previously Released	1.0 - Current	

GOC Project Case Study



Components | Versions | Remote Access

Push Upgrades

Action	Version Number	Version Name	Status
	1.9	Rollio Version 1.9	Released
Deprecate	1.8	Rollio 1.8	Released
Deprecate	1.7	Rollio Dec 2018 V.2	Released
Deprecate	1.5	Rollio	Released
Deprecate	1.4	Rollio	Released
Deprecate	1.3	Rollio	Released
Deprecate	└ 1.3 (Beta 1)	Rollio	Beta
Deprecate	1.2	Rollio	Released
Deprecate	1.1	Rollio	Released
Deprecate	└ 1.1 (Beta 2)	Rollio	Beta
Deprecate	└ 1.1 (Beta 1)	Rollio	Beta
Deprecate	1.0	Rollio	Released

GOC Project Case Study

Project Title :- Atlas Medstaff(Mobile Application Api For iOS &Android)

Problem statement :- We need to create api for ios and Android Mobile.

Also we need to send Notification in mobile when the records create in salesforce.

Project Length :- 6 month

Our Role :- Our role was Business Analysis,Solution architect and developer

Challenges:- We have challenge for send Notification and also we need to measure distance between two place and measure which one is nearest from the user preference.

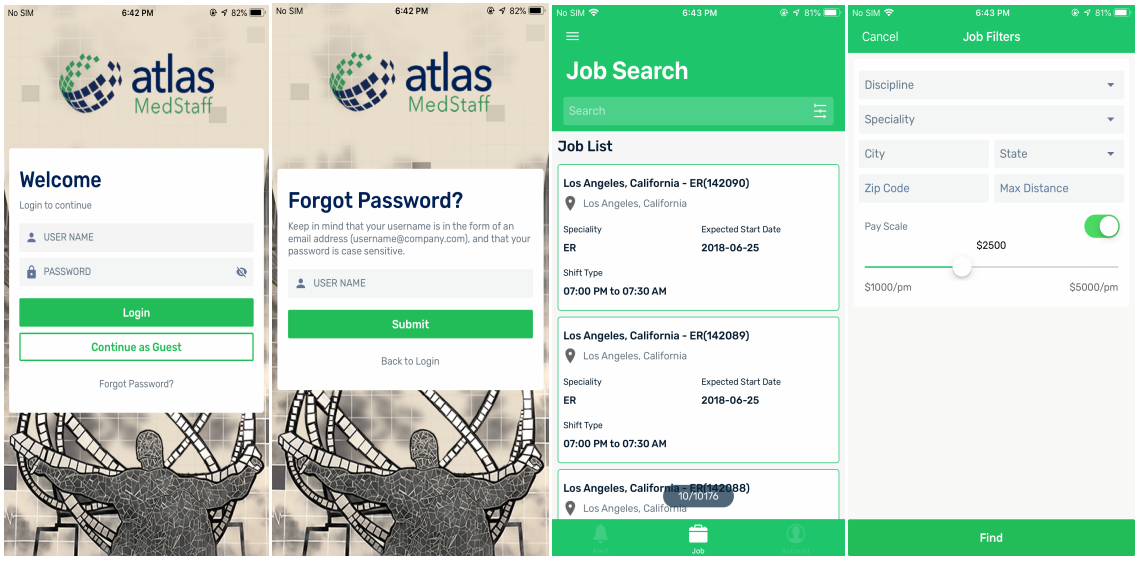
In that case we have to setup firebase environment for ios and android and also generate the key to send a notification.

Also, we need to store api token, device id (for android and iOS) and also send notification regarding records creation.

Solution:-

For distance measure we used the google Geolocation API used. And for mobile application binary file setup create a connected

app and store the android certification key and binary setup in salesforce.

Key Functionalities:-

- Responsible for customizing custom fields, Custom Setting, All Remote Sites and , Validation Rules, Report Types.
- Also created connected apps for Firebase Push notifications.
- Worked on push notification with Firebase Environment.
- Responsible for migrating data from one Sandbox environment to another Sandbox environment and Sandbox environment to Production environment using Force.com IDE tool and Change Sets
- Responsible for writing Validation Rules in Salesforce
- Involved in writing SOQL, SOSL queries in Salesforce
- Responsible for writing Test Scripts for various scenarios
- Worked on Apex Triggers and Apex Classes for custom logic