THE WELKIN SUITE

SALESFORCE CONSULTING & DEVELOPMENT

welkinsuite.com

SILVER

salesforce

PARTNER
2019

If you are a Salesforce customer, partner, or if you are new to Salesforce - our team of more than 30 certified professionals is ready to help with your most complex technical challenges.

The Welkin Suite provides professional assistance with Salesforce development and/or integration projects.

Team of **certified Salesforce engineers**

Deep knowledge of **modern technologies** and the **Salesforce system**

Custom application development and cloud application integration

Cooperation Format

Depending on the project, we can offer the cooperation format that can be based on any of the worldwide standard models (FP, FT, T&M, etc.) or any of their combinations and any other specifics that would be agreed upon.

We want to consider all of the details of a potential project before we come up with the best possible price given the expected level of quality and timing expectations of yours.

Team

Our developers stand out from the competition because they:

• have so important critical thinking skills

• insist on finding the most optimal solution

• always give a realistic picture so that projects move in the right direction

• gain as in depth understanding of our client's business issues as possible and, hence, propose the best possible solutions and approaches.

#1 Building Advanced Call Center and Sales Operations Platform

The Challenge

Salesforce CRM implementation and integration with existing advanced service solutions with very tight timeline and iterative improvements after going live.

Main goals:

- Build fast and scalable system to reduce average time for agents call processing.

- Implement complex duplicate management system.

- Implement Integration with custom payment and ordering service.

The Solution

- The Welkin Suite proposed and developed lead and opportunity flows which were reducing number of user interaction to minimum, without heavy lifted custom code developing.

- Developed custom integration for orders and payments tracking.

- The Welkin Suite has used standard features in conjunction with custom development to build automatic duplicate management system which is configured using standard features and code changes are not required.

Additionally, The Welkin Suite provided technical consulting for business decision-makers as well as to the internal Salesforce team that was created during the project implementation.

Client

Rapidly growing provider of remote technical assistance for Mac and PC computers, worldwide 24/7.

Location: Düsseldorf, Germany

Project

Salesforce implementation for a Service Center for 1000+ agents working simultaneously.

Started: February 2017

Initial release: June 2017

Status: Ongoing further development

Technology

Salesforce: Sales Cloud, Service Cloud

Development: Lightning, Apex, Visualforce, Javascript, REST/SOAP Api's, Declarative development

1.1 Building Advanced Call Center and Sales Operations Platform

The Outcome

Salesforce CRM was implemented and launched within tight deadlines, providing better growth capabilities for business due to the significantly reduced service requests processing time.

At the same time, developed solution was flexible and easy to extend and maintain, thus it is constantly improved since go-live without any significant changes in the overall design.

Due to the flexibility of the business processes during the scoping and development phases the developed solution is very efficient and does not require any significant maintenance efforts due to the lack of system customizations, except of the areas where they are crucial.

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#2 Extending Team Capacity and Expertise for a Consulting Partner

The Challenge

Satisfy rapidly growing needs in Salesforce consultants and developers to handle new and ongoing projects, enhance the overall team's expertise regarding different Salesforce products.

The Solution

The Welkin Suite allocated a team of 7 highly-qualified Salesforce Consultants and Developers, including:

- Salesforce Sales Consultant

- Pardot Consultant

- Field Service Lightning Consultant

The Welkin Suite's specialists are operating as a part of our customer's team, participating in all activities, starting from scoping, through development and ending up with go-live and trainings.

The given team is constantly trained regarding standard Salesforce capabilities and new functionality that gets released by Salesforce.

The Welkin Suite has set up additional trainings process to be able to satisfy rapid team growth without affecting the quality of team members.

Client

Rapidly growing Salesforce Silver partner in UK & Ireland, providing consulting and implementation services utilizing most of the available Salesforce products

Location: UK & Ireland

Project

Consulting and implementation services for multiple different projects

Started: December 2017

Status: Ongoing development and support

Technology

Salesforce: Sales Cloud, Service Cloud, Communities, Field Service Lightning, Pardot

Development: Lightning, Apex, Visualforce, Javascript, Declarative development

2.1 Extending Team Capacity and Expertise for a Consulting Partner

The Outcome

Added technical knowledge and implementation experience from The Welkin Suite's specialists allows our partner to better align customers' business needs with standard Salesforce capabilities, thus reducing the overall implementation cost and duration as well as ensures that implemented solutions require as little maintenance as possible.

Client

Rapidly growing Salesforce Silver partner in UK & Ireland, providing consulting and implementation services utilizing most of the available Salesforce products

Location: UK & Ireland

Project

Consulting and implementation services for multiple different projects

Started: December 2017

Status: Ongoing development and support

Technology

Salesforce: Sales Cloud, Service Cloud, Communities, Field Service Lightning, Pardot

Development: Lightning, Apex, Visualforce, Javascript, Declarative development

#3 Supporting Development Needs Across Multiple Salesforce Projects for a US Company

The Challenge

The Welkin Suite's customer is a USA company that creates and implements tools for strategic cloud technology, mainly Salesforce applications for non-profit and educational organizations. The company has recently been named to the 2014 Inc. 500 List for their exceptional leadership as a cloud technology consulting and development firm.

The company was looking for a reliable partner that could cover all the Salesforce development needs of a rapidly growing company which has a constantly increasing client base. This support was expected to be provided on all stages, starting from the capabilities and costs estimation to the maintenance of the project after the implementation of the required solutions.

The Welkin Suite has proved its ability to meet the client's requirements and was chosen after a rigorous selection process which consisted of the customer's interviewing of candidates and The Welkin Suite's providing a comprehensive evaluation package - company presentation, case studies, references, and development code examples.

Client

Salesforce integration company oriented on non-profit organizations, USA

Project

Handling all development needs for multiple legacy, ongoing and new SFDC projects

Started: May, 2014

Project type

Cloud development

Type of activity

Solutions design and planning, development, QA, troubleshooting

Status

In use; ongoing development and support; new projects implementation

3.1 Supporting Development Needs Across Multiple Salesforce Projects for a US Company

The Solution

The Welkin Suite allocated a dynamic team of one to three Salesforce developers along with a part-time Senior SFDC developer that is involved on an as needed basis. The QA activities are performed by the developers themselves.

The team has been effectively working on a number of the client's business-critical projects, including but not limited to the following:

- Complex assessment page with multiple logical flows, complex calculations, and rich configuration capabilities without coding.

- AppExchange package for integration with a 3rd party service. The developed solution provides a flexible one-way integration (service-to-Salesforce) with an external payments-related service.

- New functionality development and post-implementation support for an AppExchange package, providing the management at non-profit organizations with a solid payment module tied up with Authorize.net.

Client

Salesforce integration company oriented on non-profit organizations, USA

Project

Handling all development needs for multiple legacy, ongoing and new SFDC projects

Technology

Salesforce, Apex, Visualforce, JavaScript, CSS, HTML, SOAP & REST Web Services

The Outcome

The company is extremely satisfied with the professional approach demonstrated by The Welkin Suite and the high quality of work performed by its employees. Since the engagement started, numerous Salesforce applications have been delivered to the company's customers and are currently leveraged successfully on a daily basis. The Welkin Suite is proud to be a part of this company's recognized success and expects the continuation of this fruitful partnership for the future.

THE WELKIN SUITE

#4 Development of a Cloud Management System for an International Finance Company

The Challenge

The Welkin Suite's long-term partner is a British company that is providing financial accommodations around the world. The Welkin Suite has provided outsourcing help for this company related to the development of highly optimized business applications, web site, Cloud CRM for the agents, and mobile versions of customer applications.

The cloud solution is meant for the customer relationship management software (CRM) that is synchronized with the general web service and database.

The Solution

The Welkin Suite set up two departments in Kiev which are responsible for development:

- Backend department, responsible for the development of the C# web service. The service is using SOAP API to connect to Salesforce and keep synchronization.

- CRM team, responsible for developing the cloud service. The developers have created their own web client for the WCF service to setup a bridge connection.

Client

A leading international company providing financial services, UK

Project

Implementation of a cloud solution that allows agents to analyze and effectively process money operations

Started: 2011

Project type

Cloud development

Type of activity

Architecture designing, planning, development, QA, resolving of issues, documentation

Status

In use; ongoing development and support

4.1 Development of a Cloud Management System for an International Finance Company

The Solution

Currently, the CRM team consists of six people plus QA's. When in the course of work on the product, The Welkin Suite implemented the following:

- Projecting, development, and supporting of a well-documented Apex code

- Architecture optimization

- Writing wiki documentation and user guides for using the CRM, for customer service agents and managers.

- Developing a high-performance web service client for the bridge connection with C# .NET web service

- Database optimization and extension

- Easy and understandable reporting and analytics

- Migration to a continuous deployment scheme with Jenkins implementation, creating scripts and Java executable packages to update metadata automatically

- Extension project with Service Cloud features: Live chat, Customer Portal, CRM Call Centre

- Implementation of a public knowledge database site

- Convenient data presentation

- Covering the code by tests and providing testing of client-server applications

Client

A leading international company providing financial services, UK

Project

Implementation of a cloud solution that allows agents to analyze and effectively process money operations

Technology

Salesforce, Apex, Visualforce, JavaScript, C# WCF, jQuery, J2EE

Streaming API, SOAP Web Services, Metadata API, Service Cloud, Public Knowledge Base

Jenkins, Ant

4.2 Development of a Cloud Management System for an International Finance Company

The Solution

In this project, The Welkin Suite has experienced working with international teams and departments of different levels and has been involved in the full cycle of software development of different devices. Currently, due to the product's growing popularity, the C# department develops the .NET Web Service using:

- C#, XML, XAML

- TSP/SOAP/HTTPS protocols

The Welkin Suite used the Agile methodology and related instruments to have a perfect collaboration with the product owners and business analytics on the client side.

Products from the Atlassian package were used to have the best planning and quick reactions for urgent requests: Jira, Atlassian Wiki, Crucible, and Zendesk.

Client

A leading international company providing financial services, UK

Project

Implementation of a cloud solution that allows agents to analyze and effectively process money operations

Technology

Salesforce, Apex, Visualforce, JavaScript, C# WCF, jQuery, J2EE

Streaming API, SOAP Web Services, Metadata API, Service Cloud, Public Knowledge Base

Jenkins, Ant

The Outcome

As a result of the engagement, the developed solution is successfully being used by the company's agents and managers. It allows for the processing of thousands of financial operations to be done quickly every day in six countries in different parts of the world. The system brings a huge profit to the product's owners and keeps growing rapidly.

#5 Customer Support Service and Knowledge Base for a File Sharing Platform

The Challenge

The Global Company with headquarters in the UK, one of The Welkin Suite's clients, is a provider of secure enterprise collaboration and communication applications. Since 1999, the company is a leading provider of client-server document comparison software.

The company specializes in developing solutions, which allow individuals to create, share, and manage high-value content on a number of devices. Content owners are able to track and compare changes in documents from contributors simultaneously.

The company needed to make a redesign of its existing Cloud application and include new features and packages that would enable the existing data to be processed and calculated correctly. Also, the company required some small changes to the ASP .NET backend web site to react to changes of the Salesforce database.

Additionally, the company required integration with a number of existing services such as Facebook, Twitter, LinkedIn, and Dropbox.

Client

Industry-leading provider of secure enterprise collaboration and communication applications.

Location: UK, USA, and Asia.

Project

Development of software for personal computers, Pocket PC's, and external devices

Started: 2012

Project type

Cloud development

Type of activity

Specifications, architecture updating, redesign, optimization, refactoring, development, prototype, maintenance, QA

Status

In use; ongoing development and support

5.1 Customer Support Service and Knowledge Base for a File Sharing Platform

The Solution

First of all, The Welkin Suite's team executed migration to continued deployment using the Jenkins Service. These changes gave The Welkin Suite the ability to implement urgent changes on production immediately with a minimal risk of production issues.

The second step dealt with analyzing the project issues and identifying any possible weaknesses.

The redesign of the project was divided into the following parts:

- Increasing the code covered by tests

- Deletion of deprecated workflows and validation rules. Recreating of older approval processes.

- Analysis of the trigger functionality. Refactoring potentially dangerous places, which could cause reaching of the governor limits

- Database update. Creation of new custom objects that are required for the new business logic

- Implementation of new features

- Refactoring of the ASP.NET web site, which is connected to the Salesforce Application with SOAP API

Client

Industry-leading provider of secure enterprise collaboration and communication applications.

Location: UK, USA, and Asia.

Project

Development of software for personal computers, Pocket PC's, and external devices

Started: 2012

Technology

Salesforce, Apex, Visualforce, JavaScript, HTML5, jQuery

Force.com API: Soap And Bulk

ASP.NET, Public Knowledge Base

App Exchange modules: PKB, Markets Sales Insight, LinkedIn for Salesforce.com

Ant + Jenkins for continuous deployment

5.2 Customer Support Service and Knowledge Base for a File Sharing Platform

The Solution

For the next step of its partnership with The Welkin Suite, the client described their ideas about the escalation of the project with the integration of popular social networks and tracking services. In the case of the cloud application, it was decided to connect and configure the complete solutions represented in AppExchange. This allowed The Welkin Suite to expand the required functionality in a short period of time.

The following packages were chosen after this decision:

- LinkedIn for Salesforce
- Salesforce for Google AdWords; Salesforce for Twitter and Facebook
- Marketo Sales Insight
- File it – Dropbox connector for Salesforce

The last update of the development team was the implementation of a Public Knowledge base, which allowed for the setting up of a huge referral system similar to wiki. The team deployed it with Site.com using PKB package, HTML5, and jQuery.

Client

Industry-leading provider of secure enterprise collaboration and communication applications.

Location: UK, USA, and Asia.

Project

Development of software for personal computers, Pocket PC's, and external devices

Started: 2012

Technology

Salesforce, Apex, Visualforce, JavaScript, HTML5, jQuery

Force.com API: Soap And Bulk

ASP.NET, Public Knowledge Base

App Exchange modules: PKB, Markets Sales Insight, LinkedIn for Salesforce.com

Ant + Jenkins for continuous deployment

The Outcome

The final quality of the products developed by The Welkin Suite team complied with the quality level requested by the client. The team completed the assigned tasks within the planned timeframe and met all of the required deadlines. The efficiency of the cloud application was increased due to the creation of an optimized architecture and using well tested AppExchange packages.

#6 Brokerage Website

The Challenge

The Welkin Suite's USA-based client is specializes on used equipment brokering and aims to bring this experience to the web incorporating custom relationship management services in the most efficient way.

Client

Industry-leading company specializing in the used equipment brokering.

Location: USA

Project

Development of the brokerage website that is directly integrated with Salesforce

Started: January 2015

Project type

Cloud and web development

Type of activity

Architecture and integration design and planning, development, QA, troubleshooting, documentation

Status

Pre-launch preparations; Ongoing development

Development of a brokerage website that is directly integrated with Salesforce

6.1 Brokerage Website

The Solution

Prior to development The Welkin Suite have held multiple design sessions involving CRM and web technical specialists as well as clients to discuss, document and finalize general design approach, development process and level of the user experience that is going to be achieved taking into account:

- Initial development cost

- Maintenance cost (licenses, hosting, 3rd-party services, etc.)

- Further system extension capabilities and cost

General system design includes Salesforce as a CRM and administrative tool for brokers and PHP website as a customer-facing interface to list and buy used equipment. In order to achieve maximal performance and reduce maintenance costs website is developed in such a way that it always has the read-only copy of all the data in Salesforce with synchronization delay not more than 5 minutes. At the same time all editing operations (like listings creation) are performed directly on a Salesforce side using custom-built Visualforce pages that are seamlessly integrated in to the website.

The Welkin Suite allocated fixed team of Salesforce and Web developers as well as QA engineer along with a part-time senior SFDC developer and Web tech lead.

Client

Industry-leading company specializing in the brokering of used equipment.

Location: USA

Project

Development of the brokerage website that is directly integrated with Salesforce

Started: January 2015

Technology

Salesforce, Apex, Visualforce, PHP, Javascript, jQuery, Bootstrap, SOAP & REST web services

6.2 Brokerage Website

The Solution

The team implemented the following:

- Building Salesforce organization for the project from scratch including:

  - Objects configuration

  - Validation rules creation and configuration

  - Workflows creation and configuration

  - Outbound emails creation and templates configuration

  - Setting up public Force.com site

  - Setting up permissions schema

- Developing of a custom authentication mechanism on both Salesforce and PHP sides in order to communicate securely between systems

- Developing Visualforce pages for all customer and broker-facing actions and styling them in order to match website's look'n'feel

- Developing negotiations, sales and notifications processes using Apex triggers and Visualforce pages

- Setting up and configuring AWS hosting and EC2 for the website

- Developing of the website which handles all user actions and performs synchronization with Salesforce

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Client

Industry-leading company specializing in the brokering of used equipment.

Location: USA

Project

Development of the brokerage website that is directly integrated with Salesforce

Started: January 2015

Technology

Salesforce, Apex, Visualforce, PHP, Javascript, jQuery, Bootstrap, SOAP & REST web services

6.3 Brokerage Website

The Outcome

As a result of such an integrated project client has received an e-commerce website which is as powerful as Salesforce with maintenance cost same as for a regular website without rich CRM capabilities. Implemented solution allows company to manage all their processes in the same place and rapidly extend their business.

Client

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Location: USA

Project

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Started: January 2015

Technology

Salesforce, Apex, Visualforce, PHP, Javascript, jQuery, Bootstrap, SOAP & REST web services

#7 Custom Service Cloud business process

The Challenge

Client's goal was to manage vehicle repair services using custom service business process, provided by different supplier partners with no limitations related to platforms or devices their partners will use.

Client

Leader in providing express vehicle travel services in North-West Europe

Location: Sweden

Project

Development of management system for the vehicle support and repair works

Started: Spring 2015

Completed: Autumn 2015

Technology

Salesforce, Apex, Visualforce, JavaScript, HTML5, Salesforce1

Force.com API: REST

Partner portal customization using Visualforce and HTML/CSS design.

C# .NET solution for third party service, to have ability connect to the Salesforce and submit its data through Salesforce REST API.

7.1 Custom Service Cloud business process

The Solution

Solution implementation was divided into 3 major steps:

- Creation of new custom service business process and two-way integration with third party service, which takes core role of new support cases creation, it involved following items to be made by The Welkin Suite:

  - Create new case records using data pushed from third party service via REST API.

  - Update new records created through Salesforce UI, using data stored at the remote database.

- Build partner portal to have all of the car parts suppliers involved in the support process, with automated notification module for keeping up to date status for all companies being involved:

  - Have flexible business process for cases managed, to have them assigned for different roles of users independently from theirs license type.

  - Notify all Salesforce users via emails, whenever case stage or comments are edited by people involved in the support process.

- Salesforce1 native support for service agents, to work with their cases while on the move.

  - Make user experience for agents that are using Salesforce1 app on their mobile devices as comfortable as possible, while they are working on their cases on-site with customer.

Client

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Project

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Completed: Autumn 2015

Technology

Salesforce, Apex, Visualforce, JavaScript, HTML5, Salesforce1

Force.com API: REST

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C# .NET solution for third party service, to have ability connect to the Salesforce and submit its data through Salesforce REST API.

7.2 Custom Service Cloud business process

The Outcome

During our cooperation with customer we completed the project starting from early technical documentation writing and scoping out the project, until the solution was done and approved by client. We performed multiple deployment session for each step of the development until solution was released. We also participated on the knowledge transfer for the customers Salesforce administrators to take care of the post release project support and completed our mission as a contractor with customer's maximum satisfaction rate.

Client

Leader in providing express vehicle travel services in North-West Europe

Location: Sweden

Project

Development of management system for the vehicle support and repair works

Started: Spring 2015

Completed: Autumn 2015

Technology

Salesforce, Apex, Visualforce, JavaScript, HTML5, Salesforce1

Force.com API: REST

Partner portal customization using Visualforce and HTML/CSS design.

C# .NET solution for third party service, to have ability connect to the Salesforce and submit its data through Salesforce REST API.

#8   Archived Salesforce data storage sync with Heroku cloud

The Challenge

Project request was to design and build web-service which will store archived activities data in the Heroku cloud, to have our client's Salesforce data storage optimized and managed correctly. Another part of the request was to design our own integration solution instead of 'Heroku connect', provided by Salesforce, to optimize costs of data storage and management.

Client

Premier provider of business transformational solutions, assisting its clients to completely revolutionize the customer service experience, being on the market for over 30 years

Location: US, UK, Argentina

Project

Development of two-way integration with Heroku cloud application to store Salesforce archived activities data

Started: Autumn 2014
Completed: Winter 2015

Technology

Salesforce, Heroku, Apex, Visualforce, JavaScript, JQuery, JQuery DataTables, Ruby on Rails, PostgreSQL

Force.com API: REST

8.1 Archived Salesforce data storage sync with Heroku cloud

The Solution

Building Salesforce solution pieces on the existing customer's sandbox:

- CSV wrapper to have minimal serialization data size overhead on the large volumes of data passed to and from Salesforce.

- Heroku web-service API wrapper.

- Visualforce page with JQuery and JQuery datatables on board, to display data stored inside Heroku, with lazy loading and ability to sort, filter data.

- Schedule-batch job, to move archived activities data overnight to Heroku from Salesforce.

Completely new Heroku instance implementation, involving following components:

- PostgreSQL database.

- Authentication layer, to keep Salesforce data secured inside the DB.

- Ruby on rails web-service to store and provide activities data for Salesforce authenticated instance.

Client

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Location: US, UK, Argentina

Project

Development of two-way integration with Heroku cloud application to store Salesforce archived activities data

Started: Autumn 2014

Completed: Winter 2015

Technology

Salesforce, Heroku, Apex, Visualforce, JavaScript, JQuery, JQuery DataTables, Ruby on Rails, PostgreSQL

Force.com API: REST

8.2 Archived Salesforce data storage sync with Heroku cloud

The Outcome

Using solution provided by The Welkin Suite, our customer was able to lower his expenses over data storage on his Salesforce production instance, without losing archived data quality or having any performance drops for his employees working with Salesforce on daily basis. Our client's business and technical teams were happy about the way we handled security, technical design and implementation of the applications for both Salesforce and Heroku.

Client

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Location: US, UK, Argentina

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Development of two-way integration with Heroku cloud application to store Salesforce archived activities data

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Technology

Salesforce, Heroku, Apex, Visualforce, JavaScript, JQuery, JQuery DataTables, Ruby on Rails, PostgreSQL

Force.com API: REST

About The Welkin Suite

The Welkin Suite is a well-known developer of one of the major development tools for Salesforce, that is used by thousands of developers across the world - The Welkin Suite IDE. We use our broad software development and Salesforce development expertise to provide our customers with exceptional Salesforce consulting and development services; to help companies leverage their Salesforce organizations; to help businesses start their great Salesforce journey; to develop game-changing products within the Salesforce platform and for the Salesforce platform.

The Welkin Suite is a child company of Softheme and Polytech Software, an international group of companies dedicated to investing in Ukraine's IT outsourcing industry. We provide cloud, desktop, web, and mobile software development, and Salesforce development and integration along with independent software testing and QA, remote administration, and Internet marketing outsourcing. We are recognized as the Technical Talent Company that knows how to hire and retain prominent IT specialists.

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