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Jade Global worked with a sense of urgency to help us meet our milestones. We hit our go-live date, within budget, and provided our new affiliate with working systems for quoting, orders, financials, billing, reporting, and so much more...I am accustomed to large projects with a few key players, but truthfully every member of the Jade team gave this project their full attention, effort, and creative thinking as we overcame all obstacles. //

- VP, Cloud Operations and IT, Centrifly

Business Requirements

- Salesforce footprint creation
- Migration of data and meta data to new footprint instance
- AppExchange package installation and configuration

Business Challenges

- All users needed to be migrated to a new Salesforce instance
- All profiles, roles and permissions needed to be migrated to the new instance
- Attachments and Knowledge Articles had large amounts of data, all of which needed to be migrated
- Some users would have to be deactivated, as they were not required in the Idaptive system
- Package licenses needed to be configured to users
- CPQ products and configurations needed to be migrated

Jade Global Provides Clear Path for New Cyber Security Spinoff through Large-Scale Salesforce Data Migration Project

Product & Services:

- Salesforce Sales Cloud®
- Salesforce Community Cloud
- Salesforce CPQ
- AppExchange® packages

Client - Centrifly Corporation

Industry - Computer Software and Cyber Security

About the Client

Centrifly is an American cybersecurity company focused on the legacy approach to Privileged Access Management. They offer Cloud-ready Zero Trust Privilege to secure modern enterprise use cases. Founded in 2004, the company has served more than 5,000 customers including over half of those in the Fortune 100, the world's largest financial institutions, intelligence agencies, critical infrastructure companies and more than sixty federal agencies. Centrifly is headquartered in Santa Clara, California.

Project Scope Focused on Reducing IT Reliance

In October 2018, Centrifly created a spinoff of its Identity-as-a-Service (IDaaS) service into a new company, which is named Idaptive. The move allowed Centrifly to shift its focus to privileged access, as part of its strategy around the Zero Trust concept.

As a result of this move, Idaptive required a new Salesforce footprint to carry the business. Centrifly needed an experienced Salesforce partner to migrate its data from Centrifly to Idaptive's new Salesforce instance. Business users, profiles, objects, company information, and all data need to be migrated over 4 weeks' time. In addition, package licenses needed to be installed and configured to users.

Salesforce Org to Org Migration for Large Volumes of Data

Centrifly was looking to create a new CRM footprint for its new systems with Salesforce data. However, Centrifly is an organization with huge volumes of data and Salesforce users, all of which required migration to the new instance. Centrifly's legacy system contained 55 packages that required installation and configuration. There were 39 Standard Objects packages in Salesforce.com (accounts, contacts, opportunities, leads, etc.) and 753 Custom Objects had been created to store information specifically for Centrifly's business needs.

Events and Tasks within Salesforce contained 50,000 packages. All CPQ, Sales Cloud, Service Cloud, Community Cloud data, Knowledge Articles and Attachments in Salesforce needed to be migrated as well.

- Sales Cloud and Community Cloud details needed to be migrated
- Events and Tasks needed to be migrated for events to be in the Idaptive system
- Custom and Standard Objects and data needed to be migrated so the new instance would be ready for functional use

New Footprint with Migrated data

Jade Global's Salesforce team loaded Centrifry's Idaptive instance with new data; Users, Profiles, Roles, Permissions, Standard Objects, Custom Objects, Packages, Meta Data, Groups, Queues, Activities, Tasks etc. As a result, Idaptive can continue business as usual in the same way activities were managed in Centrifry's Salesforce system.

Creation of new accounts, opportunities, configuration of quotes, addition of products, case logging and assignment rules, business information etc. is managed with less effort for modification.

The Solution

- Used Ant Salesforce data migration tool to migrate meta data
- Data loader used for data migration
- Workbench used to load some meta data components
- Configured and installed packages with latest versions
- Assignment Rules, Escalation Rules, and Org. wide permissions handled in sequence
- Migrated data sequentially by understanding the relationships and maintaining sequences between objects



About Jade Global

Jade Global provides enterprise business application implementations, integrations, software product engineering, Cloud services, technology advisory, testing, and managed services. We are headquartered in San Jose, California with U.S offices in Philadelphia, Boston, Los Angeles, San Diego and Atlanta. Jade Global is an Oracle Platinum Cloud Select partner, Salesforce Silver Partner, ServiceNow Silver partner and Microsoft Gold partner. We have additional strategic partnerships with Zuora, Dell Boomi, NetSuite, and Tableau. Jade is a member of the Oracle Cloud Excellence Implementor (CEI) Program and has been recognized as one of the fastest-growing companies in North America by Inc. 5000.

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