

## Custom Apex and Lightning Components

## Reusable Components Querying Large Data Volumes, Fast



|           | Console   | Sele                 | ect ~                      | + 🛱 My F                                  | ortfolio 🗸 🗙      |              |                  |   |                        |
|-----------|---|----------------------|----------------------------|---|-------------------|--------------|------------------|---|------------------------|
| (6 - 4) 1 |   |                      |                            |   | -16-411           |              |                  |   | $\sim$                 |
| -         | / Portfolio   |                      |                            |   |                   |              |                  |   |                        |
|           | Portiolio   |                      |                            |   |                   |              |                  |   |                        |
| Customer  | is a second s | ~ <i>~~~</i> /~~/.~~ |                            |   |                   |              |                  |   |                        |
| JI        |   | *                    |                            |   |                   |              |                  |   |                        |
| active    | Date  | 14310                |                            | Reactive                                  |                   |              | 53.0M            |   |                        |
|           | tanding Executi   | un Comto etc         |                            |   | Red Accounts      |              |                  |   |                        |
|           | -   |                      |                            |   |                   |              |                  | \Xi My Trails                                   | -                      |
| OMPANY    | TOTAL AOV (USD)   |                      |                            | RED ACCOUN                                |                   | ISK 🕹        | # DAYS RED       |   |                        |
|           | \$2.5M  | GG 1                 | 07/31/2017                 |   | \$400K            |              | 50               |   |                        |
|           | \$1.5M  | AA 1                 | 07/31/2017                 | -   | \$300K            |              | 40               | Ouick Start: Lightning                          | Empower Your           |
|           | \$1.25M   | NN 1                 | 07/31/2017                 |   | \$300K            |              | 30               | Einstein Vision Experience Rollout              | Business with Einstein |
|           |   | View All             |                            | View All                                  |                   |              |                  |   |                        |
|           |   |                      |                            |   |                   |              |                  | View All  |                        |
| Outs      | tanding Success   | Commitment           | s                          | Accounts with Low Quarterly Survey Scores |                   |              |                  | Customers                                       |                        |
| OMPANY    | TOTAL AOV (USD)   | COMPASS NAME         | STATUS                     | ACCOUNT                                   | AOV (USD) 🕹       | EXPERIENCE   | CONTACT NAME     | Companies: 5                                    |                        |
|           | \$2.5M  | GG 1                 | In-Progress                |   | \$2.5M            | 3            |                  | Accounts: 20                                    |                        |
|           | \$1.5M  | AA 1                 | In-Progress                |   | \$1.5M            | 3            |                  | l   |                        |
|           | \$1.25M   | NN 1                 | In-Progress                |   | \$1.25M           | 3            |                  | Monthly Key Portfolio Metrics                   |                        |
|           |   | View All             |                            | View All                                  |                   |              |                  | As of 04/30/2017                                |                        |
|           |   |                      |                            |   | ^                 |              |                  | AOV Growth \$                                   |                        |
| Outs      | tanding Joint As  | sessments            |                            | Low License Utilization Below 80%         |                   |              |                  | AOV Growth %                                    |                        |
| _         |   |                      |                            | -   |                   |              |                  | EWS Growth %                                    | •                      |
| OMPANY    | TOTAL AOV (USD)   |                      |                            | ACCOUNT                                   | AOV (USD) \$      | CURRENT LIC. | SFDC LIC. UTIL % | Attrition: Core + MC S                          |                        |
|           | \$2.5M  | GG 1<br>AA 1         | In-Progress                |   | \$2.5M            | 10           | 20.33<br>30.33   | License Utilization %<br>Customer Engagement %  |                        |
|           | \$1.5M<br>\$1.25M   | NN 1                 | In-Progress<br>In-Progress | -   | \$1.5M<br>\$1.25M | 10           | 40.45            | Qualified Opportunities #                       |                        |
|           | \$1.25W   | DUA T                | meiogress                  |   | MC2.16            | 10           | 10.10            | *- = Not applicable; not defined at this level. |                        |
|           |   | View All             |                            |   |                   | View All     |                  |   |                        |
| _         |   |                      |                            | _   |                   |              |                  | Events  |                        |
| Outs      | tanding Quarter   | h. Cueses Dev        | i en une                   | Open Critical Cases                       |                   |              |                  | Events  |                        |

## The Challenge

This fortune 500 CRM provider needed a quick, configurable way to view critical accounts in lists across a myriad of metrics to enable their customer success and sales teams to focus in on key accounts.

Likewise, this organization had reached all of its limits in nearly all available areas (objects, fields, custom settings, custom metadata, and more), so a performant, lean solution that worked on objects already heavily loaded with automations (triggers, workflows, processes) was imperative.

## The Solution

With nearly pixel perfect mocks in hand from the client, we worked to quickly nail down performance and maintenance requirements. From there, we collaborated with client engineers

to design a reusable lightning component that rendered data from custom metadata settings, so all administrators had to do was to write (or rewrite) custom metadata records and place components on a home or record lightning page.

Further, the client had strict requirements that all 20 components on this page (and the page itself) loaded within 4 seconds. Through intelligent query optimization (querying large data volumes), field indexing, and applying innovative methods to resolve lightning component proliferation issues, we exceeded these benchmarks. We also worked with the client on employing Einstein (Wave) analytics dashboards as components on record and home pages for a complete end-to-end solution.

This lightning console solution went live three years ago and is still heavily used today by a large number of users.

Looking to build your business on data driven insights and analytics? <u>Contact us today</u>. theCodery (628) 777-3824 discovery@thecodery.io