



# Defining Independent Needs with Salesforce

Migrating a Shared Salesforce Platform to an Independent One

## OBJECTIVE

Our customer was sharing another company's Salesforce platform, but our customer purchased two enterprise licenses for themselves. They required data migration and minimal customization of labels from the old platform to the new one.

## CHALLENGES

- All data from the old org platform needed to be integrated and managed alongside data from the new one.
- After migration, all info (new and old) had to be itemized: lead, account, contact opportunity documents, activities, report dashboard process builder, workflow, Lightning layout, profile, email alerts, and email templates.
- All contacts in current Excel spreadsheets had to be migrated to the new org.

## APPROACH

- Data will be migrated from spreadsheets to the Salesforce enterprise independent platform using the enterprise license and preserving the contacts' details and related records.
- Duplicate records will be merged and the sanity of the system will be checked.
- Clickdeploy.io will be used for metadata migration.
- Dataloader.io will be used to upload records.

## BUSINESS BENEFITS

- An independent Salesforce platform with identity and integrity for advance customization is now available with the history of records preserved for report or audit production.
- Data is cleaned, labeled, and organized for easy retrieval.
- Excel spreadsheets are no longer needed, and all data is migrated into one place for ease of managing.

## INDUSTRY

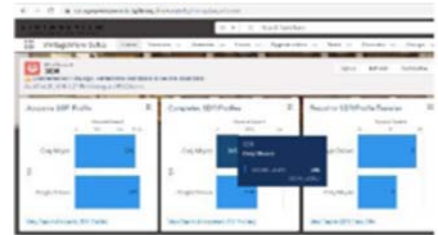
Commercial

## CUSTOMER PROFILE

US-based enterprise dealing in heating, air conditioning, and refrigeration.

## TECHNOLOGY AND TOOLS

- Clickdeploy.io
- Dataloader.io



## ABOUT CLOUDQ

CloudQ helps companies succeed by consulting, implementing solutions, and providing certified professionals. We're one of the INC 5000 fastest-growing private companies, and we're based in Alpharetta, GA. We specialize in cloud-based technology implementation and are a Silver Consulting partner with Salesforce and have a transparent, highly-efficient, customer-centric business model.

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