



# Integrity and Throughput with Salesforce

Enhancing Implemented Salesforce Through Hierarchy

## OBJECTIVE

To provide integrity and better user experience by introducing Salesforce community plus licenses for existing instructors and arranging their hierarchy below the admin in Salesforce. Migration from classic to Lightning version of Salesforce needed to increase user experience. Migration from Salesforce classic to the newer version while keeping data intact.

## CHALLENGES

- Several Lightning enabled and non-enabled components to migrate
- Community pages of artists who were new and original needed to have equal access to all features
- Sharing rules were defined by admin or community user
- Objects no longer needed had to be removed from the system with their historical data preserved for tracking
- Integration with third-party (PayPal) app

## APPROACH

- Migration of classic to Lightning while preserving all the existing features
- Implementing SFDC with the new community customer plus licenses to manage the tracking of scheduled events
- Improved user experience by using Lightning mode, providing the admin with the ability to set the hierarchy
- Preserved historical data while cleaning objects no longer needed to create a healthier system
- Custom building of features in Lightning to handle non-enabled components and community pages

## BUSINESS BENEFITS

- Better management of budgets by cutting down of licenses providing essential features to community users
- Much better experience for users of the system across the board
- Ease of data management by the admin to oversee schedules, review them, and reflect on the data given

## INDUSTRY

Retail

## CUSTOMER PROFILE

US church-based retail enterprise with years of experience holding paint parties and providing instructors.

## TECHNOLOGY AND TOOLS

- Data migration
- Sales Cloud
- Lightning platform
- PayPal integration
- Community enabled custom features



## 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.

## CONTACT

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